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1. Executive Summary

The Customer Service Transformation (CST) Laboratory for DIMHRS Business Area 16, Retirements, took place 17 through 20 November 2003. Participants included individuals from base level, MAJCOM, AFPC, Active duty, Air National Guard (ANG), Reserve, and civilian personnel.

The Retirements Laboratory focused on the business process redesign (BPR) of military and civilian retirements. The BPR's scope encompassed Reserve, Guard, and Active components and civilian personnel at all levels of the Air Force. The Lab reviewed information supporting the business area processes, including the role of process owners, governing mandates, forms, systems associated with the processes, and estimated levels of effort. The As-Is civilian retirement processes included only those personnel receiving full service from AFPC (83 bases). Information was not available from organizations receiving limited AFPC service (13 bases).

The Lab decided that, in the redesigned environment, To-Be processes could work across the entire civilian spectrum, but lacked data to substantiate their assessment. The civilian full-time equivalents (FTE) identified as potential savings included only those impacted by AFPC-serviced bases. The Lab did not identify any opportunities within this business area to combine military and civilian retirement processes. The Lab demonstrated To-Be proofs of concept using commercial off-the-shelf (COTS) software applications. Lab participants validated eight To-Be processes.

The scope of the Air Force Retirements program is significant. In 2002, there were more than 30,000 military retirements and 3,200 civilian retirements. The human resources (HR) workload required to perform the As-Is processes in 2002 is estimated to be more than 356,000 hours or 200 FTEs. The validated To-Be processes will require an estimated 128,000 hours, a reduction of about 228,000 hours of work or 120 FTEs.

The Lab substantially changed the military service delivery model from near-total front-line support in the As-Is model to a To-Be model where an estimated 73% of service will be provided by the AF Portal, 25% by the Contact Center, and 2% by front-line support. While a civilian Contact Center manages most civilian retirements in the As-Is process, the Lab recommended technological improvements to increase efficiency by 20%. The implementation of these improvements is largely dependent on the Office of Personnel Management's (OPM) ability to build and manage electronic records.

Process cycle time also was reduced. The Lab estimates that the To-Be processes will compress military HR cycle times by a factor of 3.3, while civilian HR cycle time remains largely unchanged. Customer/decision-maker cycle times were not significantly impacted because the initiation and completion of retirement actions are largely driven by personal/policy decisions, as opposed to process. In addition, Lab estimates indicate that the To-Be processes will reduce customer workload by about 23%, while providing better access, increased functionality, improved accuracy and accountability, higher reliability, and increased morale.

While the full benefit of process redesign depends on both the content management system (CMS) and human resources management system (HRMS), implementation of CMS capabilities would result in a "quick win." The benefits anticipated would accrue in the short term.

While the Lab estimates that implementing the To-Be processes will yield dramatic savings, it must be noted that they are just that—estimates—and should be validated after implementation.

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2. Business Area Mini-Vision

Business Area 16, Retirements, focuses on the activities and processes associated with administering military and civilian retirement programs. Business Area 16 describes functions that support the administration of policy, eligibility, approvals, and retirement contributions, as well as responsibilities within these areas.

The Lab captured enterprise-wide processes through multiple means, using subject matter experts from base level to higher headquarters to validate these processes. The Lab also captured supporting process information to provide a total picture of the processes identified. The information collected includes process owners, governing mandates, forms, systems associated with processes, estimated levels of effort, and recommended predispositions. Stakeholders provided Mini-Visions for the HR Lab to use as guidance in producing To-Be process requirements.

The Business Area Mini-Vision uses direction from the Process Owner to guide the transformation of As-Is processes, and describes the execution and support of a set of processes or discrete capabilities in the To-Be environment within a given business area. The Business Area Mini-Vision is not expected to contain step-by-step procedures or technical requirements for To-Be processes, but must provide a conceptual framework and starting point for the Lab to perform fit-test analysis and proof-of-concept evaluation. The Mini-Vision must clearly describe the direction in which the Process Owner wants transformation to proceed—it can either focus or cripple the transformation of As-Is processes. The Process Owner, therefore, has one of the most important roles in the Customer Service Transformation Program

The approved Mini-Vision provides the following direction:

- ◆ E-business approach to initiate, create, coordinate, track, decide, and change retirement applications for officer, enlisted, and civilians
 - Ensure that solution accommodates total force
 - ◆ TDRL/HYT/Voluntary and Disability
- ◆ E-business Vertical and Horizontal notification, tracking and integration of approved actions
 - Retired Pay Estimates
 - Retirement Briefing Scheduling
 - Recognition elements for individual and dependents
 - Notification of approved action to stakeholders

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3. A Brief Description of the Stakeholders

The CST Lab focused on business process redesign (BPR) of the activities and processes associated with military and civilian retirements. The BPR's scope encompassed the enterprise, including Active, ANG, and Reserve military airmen and civilians at all levels – from individual bases to higher headquarters. Stakeholder definitions follow.

- ◆ **Decision Authority:** The official who approves requests for personnel/pay actions. There may be more than one level of coordination for approval/disapproval, recommendations, but there should be only one Decision Authority associated with the process.
- ◆ **Financial Services Office (FSO):** The Office of Primary Responsibility for administering financial services activities, programs, and operations. Activities include accounting liaison, military/civilian/travel pay customer service and customer support and disbursing/cashier functions.
- ◆ **Member:** A person affiliated with a Service, either Regular, Reserve, or Guard (DoDI 1000.13). The manpower resource mix includes military and civilian members. Civilian members are referred to as either “member” or “employee” throughout the report.
- ◆ **Office of Primary Responsibility (OPR):** Any headquarters, agency, or activity having primary functional interest in and responsibility for a specific action, project, plan, or program.
- ◆ **Process Customer:** Any individual or organization that initiates a specific action or is part of the approval/disapproval process. A Process Customer may be a commander, supervisor, member, retiree, or dependent.
- ◆ **Process Owner:** The person who coordinates functions and work activities at all levels of a process, has the authority or ability to make process changes as required, and manages the process from beginning to end to ensure optimal overall performance. The Process Owner is the person closest to the process being benchmarked, and has authority to make changes to that process.
- ◆ **Process Stakeholder:** An individual with an interest in the conduct of a particular process.

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4. Statement of Need

The CST Laboratory's approach to operationalizing the Mini-Vision is to convert the current labor-intensive, paper-supported military and civilian retirement programs to an e-business approach that initiates, creates, coordinates, tracks, decides, and changes retirement applications for officers, enlisted, and civilians through electronic record processing and updating.

The e-business approach will allow personnel to electronically initiate, create, coordinate, track, decide, change, archive, and produce retirement documents. Retirement process stakeholders will be able to check the status of a military and civilian retirement document using electronic tracking and reporting/analysis tools. Members will be able to electronically review retirement information, identify discrepancies, and submit necessary data to correct discrepancies. The software will update the data, generate final documents, and notify the appropriate individuals of the final action.

The e-business approach will realign responsibilities and workflow to reduce process times, eliminate paperwork, and provide an electronic record of all actions. It empowers members and supervisors by substantially reducing participation of the Military Personnel Flight (MPF), the Civilian Personnel Flight (CPF) and the Financial Services Office (FSO) in the retirement's process. The proposed processes work in peacetime and wartime.

The To-Be processes will be implemented using Web-based content management systems and state-of-the-art human resource management systems, allowing retirement processes to become virtual processes.

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5. Reviewed Processes by HR Lab

The current As-Is environment is manpower- and paperwork-intensive, requires many locally developed and maintained databases, and often relies on manual updates to ensure that military and civilian retirements are properly processed and recorded from initiation to completion.

The redesigned processes leverage content management system technologies to allow personnel to electronically initiate, create, coordinate, track, change, archive, and produce retirement documents when appropriate. Readily available commercial processing applications, combined with a content management system, will reduce the workforce needed to process retirements. In the To-Be environment, customers will perform most actions using self-service applications. When assistance is required, a 24 hour, 7 day a week operating Contact Center will provide it. The Contact Center is where most of the HR personnel required by the To-Be processes will be positioned. Remaining front-line support staff will provide advice and assistance to customers instead of actually processing transactions as they do now.

Each To-Be process is presented in this section in the following manner.

Paragraph 5.x.1 presents process narratives for each As-Is process that is part of the To-Be process.

Following the narratives are the flowcharts for the appropriate As-Is processes. The As-Is flowcharts are structured as shown in **figure 5-1**.

As-Is Functional Band Definitions	
HHQ	In this area, you will see tasks that are performed at Headquarters Air Force. This may include directorates subordinate to the Secretariat of the Air Force, to include Guard and Reserve activities. Roles and associated actions will be identified in each individual process. This lane should primarily consist of policy, guidance, and staff coordination.
MAJCOM	In this area, you will see tasks that are performed at the MAJCOM, NAF or FOA level, to include Guard and Reserve activities. Sometimes, this label is replaced AFPC. Roles and associated actions will be identified in each individual process. This lane should primarily consist of policy, guidance, and staff coordination.
CFF MPF	In this area, you will see tasks that are performed at Civilian or Military Personnel Flight.
Unit	In this area, you will see tasks that are performed at unit level. This may include member, supervisor, Commander's Support Staff, Commander, etc. When personnel are assigned to a headquarters function and require individual action, it is documented at this level, not the headquarters function.

Note: Process numbering is for reference only. Usually, this reflects the sequential process but this may not always be the case.

Figure 5-1. As-Is Flowchart Structure

Where there is a DIMHRS use case, it is presented after the As-Is process flowcharts.

The final portion of this paragraph is the As-Is Level of Effort Table, which describes how many of the As-Is military and civilian personnel and pay functions that support the processing of retirement processes occur in an average year (count and frequency), how long it takes to complete the average process (process time), and the total number of calendar days it takes from process initiation to completion (cycle time).

Paragraph 5.x.2 is the To-Be process narrative for each To-Be process.

The To-Be narrative is followed by the To-Be process flowcharts. The To-Be flowcharts are structured as shown in **figure 5-2**. Also note that activities that may be accomplished through the Portal are presented in **blue** on the To-Be flowcharts.

To-Be Functional Band Definitions	
HHQ	In this area, you will see tasks that are performed by higher headquarters. This may include directorates within the Department of Defense, Headquarters Air Force, Secretariat of the Air Force, AFSLMO, MAJCOMs, NAFs, FOAs, DRUs, Guard, Reserve, etc. Roles and associated actions will be identified in each individual process. This lane should primarily consist of policy, guidance, and staff coordination, and in some cases, the approval or decision authority.
Contact Center	In this area, you will see tasks that are performed by the Air Force Contact Center. Contact Center responsibilities include providing real-time services to members via email, telephone, scanning or web chat. Contact Center personnel are subject matter experts that provide consultation, guidance, process transactions, and in some cases act as decision authority, as directed. Specific actions will be identified in each individual process.
Base	In this area, you will see tasks that are performed by frontline support, unit personnel, Wing Headquarters, and any other base agency functions. This may include the MPF, CPF, FSO, unit commander, commander support staff, first sergeant, supervisor and other base personnel other than the member. Roles and associated actions will be identified in each individual process.
Member	In this area, you will see tasks that are performed by the Member. Items in this area could require the member to take action or be informational in nature, such as a tracking notification. Specific actions will be identified in each individual process.

Figure 5-2. To-Be Process Flowchart Structure

The final portion of this paragraph is the Comparison As-Is and To-Be Process Table, which shows CSTO Lab comparisons of cycle and processing times for the As-Is and To-Be processes.

Paragraph 5.x.3 presents information on the system fit-gap analysis for the To-Be process. The System Fit-Gap Analysis Chart compares system capabilities to process requirements to indicate whether the system can complete the requirement as configured, with modification of COTS, with customization of COTS, or whether the function is not available in the software.

Paragraph 5.x.4 presents the Data Elements Fit-Gap Analysis Chart, which describes the data elements required to process military and civilian retirements. The chart reports whether the personnel data system (PDS) can meet the requirement as configured, with modification of COTS, with customization of COTS, with a non-COTS custom application, or whether no comparable data element is available.

Paragraph 5.x.5 presents the Lab's assessment of the strategy and phasing of the To-Be process.

Paragraph 5.x.6 presents the Compliance Matrix, which lists the guidance associated with a process and indicates whether the redesigned process requires a guidance change.

Paragraph 5.x.7 presents the Lab's application of the IBM Core Competency Model. The Assessment of Who Does the Work is an independent assessment by the Lab on whether the task is Inherently Governmental or Military Essential.

Paragraph 5.x.8 presents risks and risk mitigation strategies based on a Lab assessment of the transformed process.

Paragraph 5.x.9 presents the Lab's assessment of the impact of transformed process on existing training and future training needed by HR professionals and others, as well as the impact of the transformed process on the career field.

Paragraph 5.x.10 lists Lab assessments on appropriate metrics to assess the success of the transformed process. The metrics presented in the Customer Service Transformation Project Plan formed the starting point for discussion of metrics. Lab participants then identified other areas where they felt the basic set of metrics was not adequate to measure the success of the To-Be process.

Paragraph 5.x.11 is the Lab's analysis of benefits associated with the To-Be process. This paragraph presents the As-Is and To-Be service delivery models, based on an independent Lab assessment of the method of service delivery for the transformed processes. This paragraph also summarizes the Lab's assessment of HR workload change, customer workload change, cycle time compression for HR and the overall process, Web empowerment of the To-Be process, and adjectival descriptions of improved effectiveness from the To-Be process.

5.1 Obtains Notification for Temporary Disability Retired List (TDRL) (Military)

5.1.1 As-Is Process Narratives

5.1.1.1 Obtains Notification for TDRL (MPF)

Describes the procedures and activities involved in obtaining TDRL notification and identifies the steps in calculating points, notifying member to commander, and processing TDRL as a normal retirement.

5.1.1.2 FM Processes for Military Retirement (Active)

Receives Joint Uniform Military Pay System (JUMPS) Transaction Register (JTR) or orders from Military Personnel Flight (MPF) and reviews JTR for E5 (separation) transaction: Establishes separation working file (SWF). Files all pay affecting documentation (including retirement orders), received from date of notification of separation in SWF, starts action to resolve any suspense items, and inputs any delinquent or required transactions. Verify that terminal leave is posted. Verify that all recent Financial Services Office (FSO) submitted transactions are posted. Transactions must be posted to the Master Military Pay Account (MMPA) by 10 days before DOS to be included in the PQ61. Maintains SWF until record is in V (final separation) status. If member is not in T-status, process ST04 and send Electronic Case Control System message (ECCS) to Defense Finance and Accounting Service-Denver (DFAS-DE).

Reviews management case files for pending debts or dependency determination: Takes action to collect all debts by DOS and when necessary, checks status of dependency determination.

Schedules briefing appointment for member: Ideally the briefing is scheduled NLT 30 days prior to DOS. Refers member to MPF if E5 transaction is not posted.

Conducts briefing to inform member of the following: The process for filing of final travel voucher, when allotments will stop paying and what allotments can carry over to retired pay, DFAS-DE will re-compute his or her pay account at DOS plus 20 days and if the re-computation shows the member was underpaid, DFAS-DE mails the additional payment to the address furnished in the E5 transaction; if re-computation shows indebtedness, DFAS-DE takes collection action. Advise members that if a financial organization or allotment recipient fails to return a payment or allotment, a debt for that amount will result. FSO is required to explain the final active duty payment to the member. Includes what entitlements will/will not be paid and any leave sell due the member.

Reviews and signs out-processing checklist and assists in completing documents: Signs member's MPF checklist and assists in allotment, direct deposit, tax changes, etc.

Reviews documents for accuracy and completeness and codes document for input: All pay documents must be coded with the proper Defense Joint Military Pay System (DJMS) format ID and action code.

Reviews travel record for outstanding orders and advances: Ensures member has no outstanding travel vouchers that must be settled.

Pulls and reviews folder prior to retirement date: Final review to ensure everything needed to compute the payment is in the folder.

Reviews record for payment authorization: Reviews pay record to ensure everything has processed properly on the record and that DFAS has authorized a payment (10 days prior to retirement date). Contacts DFAS if no payment authorization is on the record.

Pulls DJMS print, LES and other data available at base to calculate amount due at separation if no PQ61 is received from DFAS-DE: Use AF Form 350, Separation Pay Worksheet, through authorized date. Decreases amount due for questionable items. Use the computer transaction code JPBB to make the payment and process the PQ03 (payment transaction) for the amount paid.

Prepares payment document, (DFAS-DE) Form 2424, Electronic Funds Transfer Payment Request/Authorization, and sends copy of form to Quality Assurance.

Codes document for input: Sends to customer support for processing.

Sends payment message to DFAS-DE if the NT (memo) payment line on the member's record is different from the payment: This lets DFAS know that the FSO computation does not match the DFAS computation.

Annotates folder and files: File should be maintained until DFAS generates a base level separation payment report (4-5 months).

Follows-up member's DJMS retirement status: To ensure retired pay account gets set up at DFAS-Cleveland.

Reviews final travel documentation: Member has 1 year to file the voucher. Separation file is not needed to settle the travel voucher.

Forwards voucher to Customer Support for processing: FSO internal move of the voucher from the Customer Service area to Customer Support for processing into the travel system.

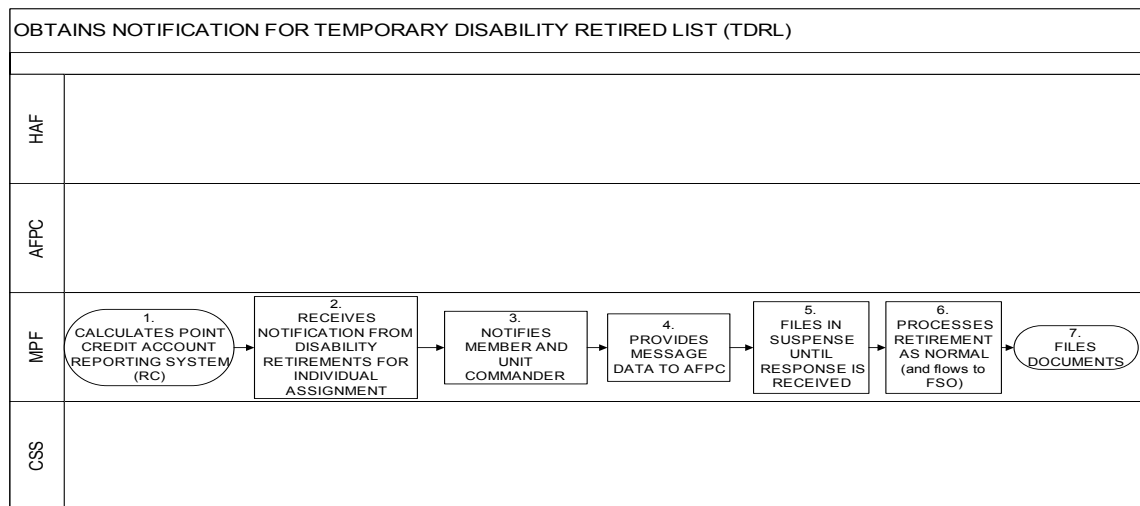


Figure 5-3. As-Is Flowchart

As-Is Level of Effort for Obtains Notification for Temporary Disability Retired List	
Cycle Time	60 days
HR Process Time	212 minutes
Count and Frequency	1,310 annually

Figure 5-4. As-Is Level of Effort

5.1.2 To-Be Process Narrative

Before this process begins, the member has been placed on the TDRL. The predecessor process is covered during business area (BA) 20, Monitor Health and Safety. Once placed on the TDRL, the member undergoes periodic medical re-evaluations. According to current guidance, the

maximum period between evaluations is 18 months, and the maximum period a member may be placed on the TDRL before being retired for disability is 5 years.

In the To-Be process, if the medical evaluation determines that the member cannot recover sufficiently to be returned to military duty, the member is retired for disability. If the medical evaluation determines that the member can be returned to military duty, the member is given the choice of returning to military duty or not. If the member chooses not to return to duty, they may choose to retire, if eligible, under any provision of law. If the member is not eligible to retire, they are separated from military service (with or without compensation).

Separations are covered in BA05, Terminations. Retirements, including mandatory, voluntary and disability, are covered in this business area in the Performs Preliminary Retirement Action and Retirements processes.

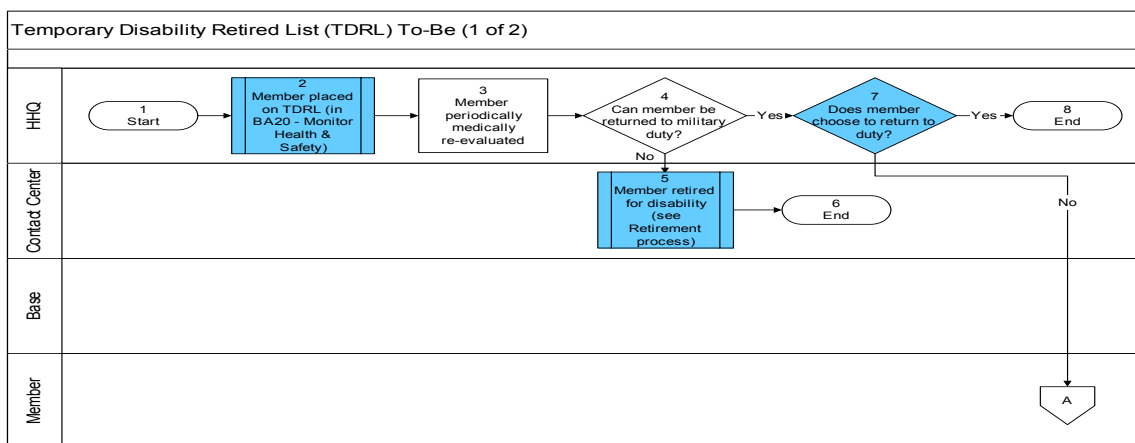


Figure 5-5. To-Be Process Flowchart (page 1 of 2)

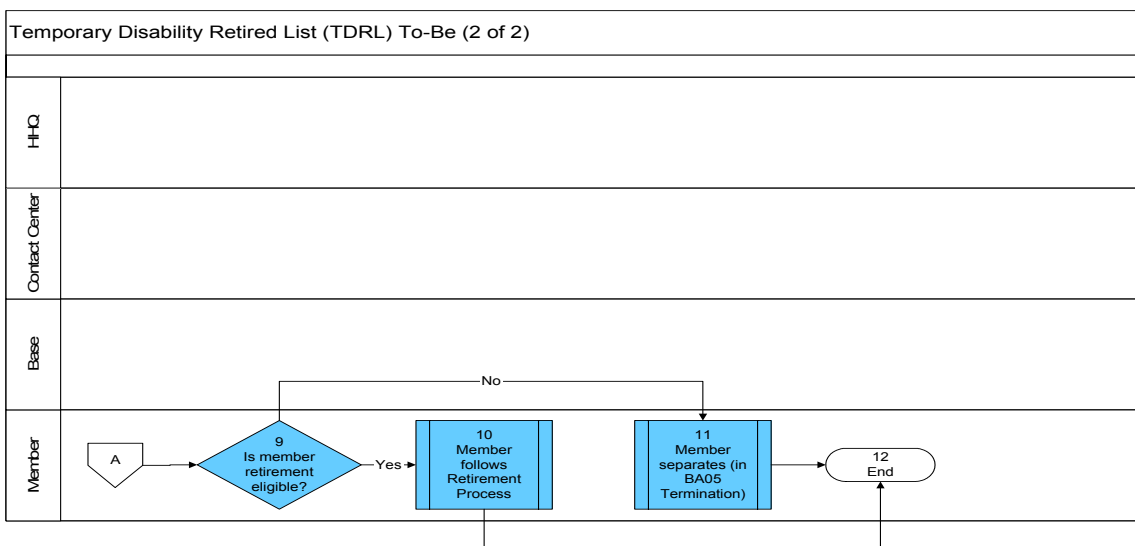


Figure 5-6. To-Be Process Flowchart (page 2 of 2)

Comparison of As-Is and To-Be for Obtains Notification for Temporary Disability Retired List				
Cycle Time Compression			Compression Factor	Change
	Process Time		4	75%
	HR Time		Total	100%
Cycle Time Reduction	As-Is		To-Be	Change
	Days	60 days	15 days	Decrease of 45 days
Average Process Time	Time	212 minutes	4 minutes	-208 minutes
	Count	1,310	1,310	No change
	Frequency	Annual	Annual	No change

Figure 5-7. Comparison of As-Is and To-Be

5.1.3 System Fit-Gap Analysis

To-Be Process Flow	Initiate	Create	Coord	Certify	Update	Archive	Produce Document
MILPDS	N	N	N	N	N	N	N
DIMHRS	Not specifically addressed in DIMHRS use case						
PeopleSoft	N	M	Y	N	Y	N	M
Oracle	N	M	Y	N	Y	Y	M
CMS	N	Y	Y	Y	N	Y	Y

C = Customization of COTS software recommended

N = Not available

M = Modification of COTS software recommended

Y = Available in software

Figure 5-8. System Fit-Gap Analysis

5.1.4 Data Element Fit-Gap Analysis

See Annexes B and C for list of data items.

5.1.5 Strategy and Phasing

Total Force	Short-Term	Mid-Term	Long-Term
Military	CMS	DIMHRS	DIMHRS Plus

Figure 5-9. Strategy and Phasing

5.1.6 Compliance Matrix

Reference Name	Reference Title	Affected by Changed Process
AFI 36-2102	Base Level Relocation Procedures	No
AFI 36-2110	Assignments	No
AFI 36-2606	Reenlistments in the USAF	Yes
AFRCI 36-201	Air Reserve Technician (ART) Officer-Extension to Mandatory Separation Date	No
ANGI 36-2101	The Active Guard/Reserve (AGR) Program	Yes
ANGI 36-3201	Air National Guard Separations Documents	No
AFCSM 36-699, Vol. 1	Personnel Data Systems	Yes
ARPCI 36-3203	Computation of USAFR Retired Pay	No
ARPCM 36-2603	Air Force Reserve Enlisted Incentives	No
DFAS DEM 7073-1/3	Defense Joint Military Pay System-AC/RC	No
AFI 36-3203	Service Retirements	Yes
AFI 36-3205	Applying for the Palace Chase and Palace Front Programs	Yes
AFI 36-3207	Separating Commissioned Officers	Yes
AFI 36-3208	Administrative Separation of Airmen	Yes
AFI 36-3209	Separation and Retirement Procedures for Air National Guard and Air Force Reserve Members	Yes
AFI 36-3212	Physical Evaluation for Retention, Retirement, and Separation	Yes

Figure 5-10. Compliance Matrix

5.1.7 Assessment of Who Should Do the Work

The action to complete this process is neither Inherently Governmental nor Military Essential. See Section 11 for additional details.

5.1.8 Risks and Mitigation

Threat/Risk Title: Adverse Impact on Service Culture

Description: Change always carries some risk, but the Lab anticipates little impact. However, care must be taken to ensure that all changes are well communicated and that any necessary training is accomplished.

Probability: Low **Impact:** Low

Mitigation: CSTO will develop and implement an appropriate communications and training plan.

Threat/Risk Title: Portal Development/Evolution Does Not Keep Pace with CST Timeline

Description: Portal development must keep pace with the demands of CST implementation. If the Portal is not ready for redesigned CST applications, their implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement and financial support may be required to keep the CST project on track.

Threat/Risk Title: DIMHRS Is Cancelled or Significantly Delayed

Description: The DIMHRS project may be cancelled or significantly delayed, making it unable to support CST.

Probability: Moderate **Impact:** Low

Mitigation: Develop a contingency plan, based on COTS technology, for implementing CST processes if DIMHRS is delayed and/or cancelled.

5.1.9 Training Need and Potential Career Field Impact

Training may need to be modified to reflect new processing changes and/or to prepare individuals to use the process and capabilities. The changes within this process are expected to have moderate career field impact.

5.1.10 Metrics

The overarching objectives of Customer Service Transformation apply to all processes within this business area and are adequately measured using the following metrics:

- ◆ Customer satisfaction
- ◆ Self-service applications available via Portal and Contact Center
- ◆ Self-service transactions (as percent of total)
- ◆ Manpower savings

5.1.11 Benefits Analysis

5.1.11.1 Service Delivery Model

Method	As-Is	To-Be
Front-Line Support	100%	0%
Contact Center	0%	2%
Portal	0%	98%
Total	100%	100%

Figure 5-11. Service Delivery Model

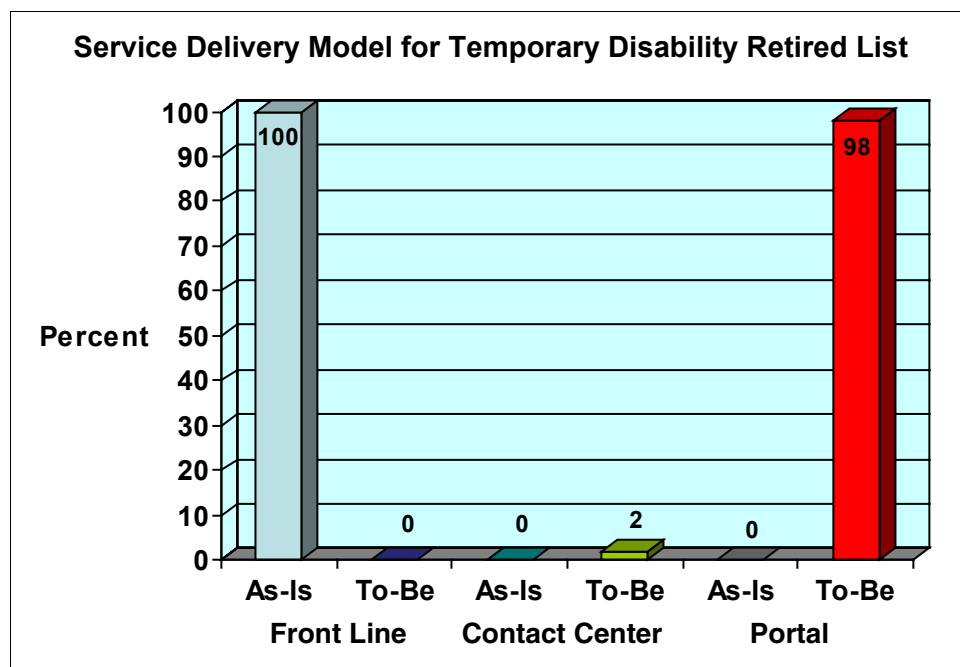


Figure 5-12. Service Delivery Model

Category	Units	To-Be
HR Workload Change	Time	Decreased by 98%
Customer Workload Change	Time	Decreased by 0%
Cycle Time Compression	Days	Decreased by 75% Process Decreased by 100% HR
Web Empowerment	Time	98%
Improve Effectiveness		Accountability and tracking; access time; increased functionality, accuracy, reliability, and morale

Figure 5-13. Lab Benefits Estimate

5.2 Processes Reserve Component Survivor Benefit Plan (RCSBP) Annuity Cases (Reserve-ANG) (Military)

5.2.1 As-Is Process Narrative

5.2.1.1 RCSBP Annuity Cases (ARPC)

Describes the procedures involved after notification of member's death: death verification, pay order of deceased, and distribution of beneficiary information.

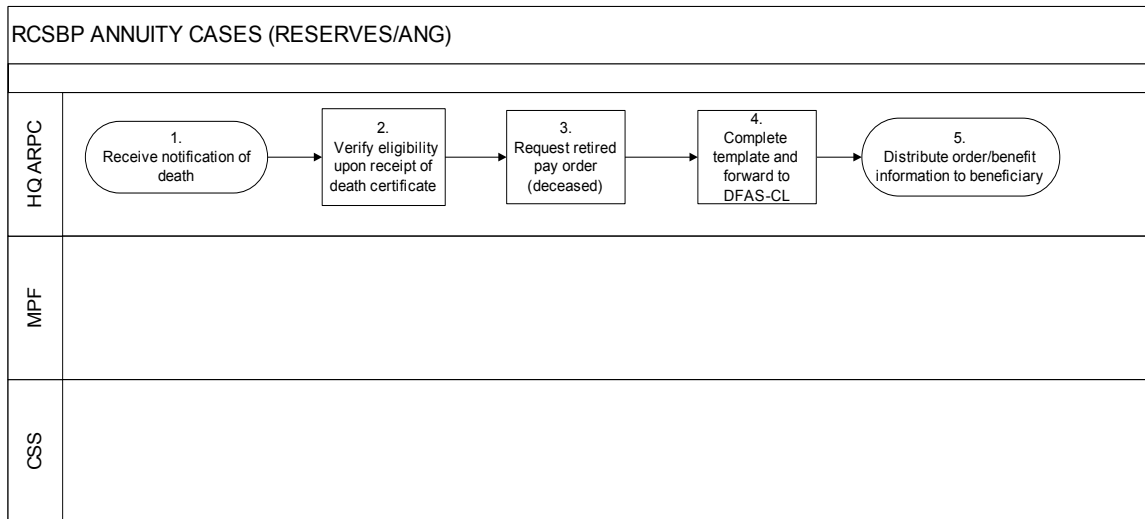


Figure 5-14. As-Is Flowchart

As-Is Level of Effort for Processes RCSBP Annuity Cases (Reserve-ANG)	
Cycle Time	15 days
HR Process Time	120 minutes
Count and Frequency	180 annually

Figure 5-15. As-Is Level of Effort

5.2.2 To-Be Process Narrative

In this process, the Reserve or Air National Guard member has retired and was not receiving a retirement annuity. If the member was receiving a retirement annuity, notification would be directly to DFAS and would not involve this process. When the member dies, the beneficiary/designee contacts the Contact Center or visits the designated front-line consultant for assistance, according to the instructions provided when the member enrolled in RCSBP. Those instructions may provide phone numbers, Web addresses and, if necessary, login instructions and a PIN for the Air Force Portal. The assisting function (either front-line support or the Contact Center) advises the beneficiary/designee of documentation requirements, such as an official copy of the death certificate and necessary application.

The beneficiary/designee provides the required documentation to the assisting function by mail, fax, personal delivery, etc. Flexibility is necessary because the beneficiary/designee may not be located near an installation or have Web access. The assisting function verifies the spouse's entitlement, updates the Human Resource Management System by confirming that the member has died, and notifies the Defense Finance and Accounting Service and others, as appropriate. Most if not all information necessary to generate a retired pay order should be preprogrammed into the system at the time a member is enrolled in RCSBP. The beneficiary/designee is notified of their benefits and entitlements once all processing is complete.

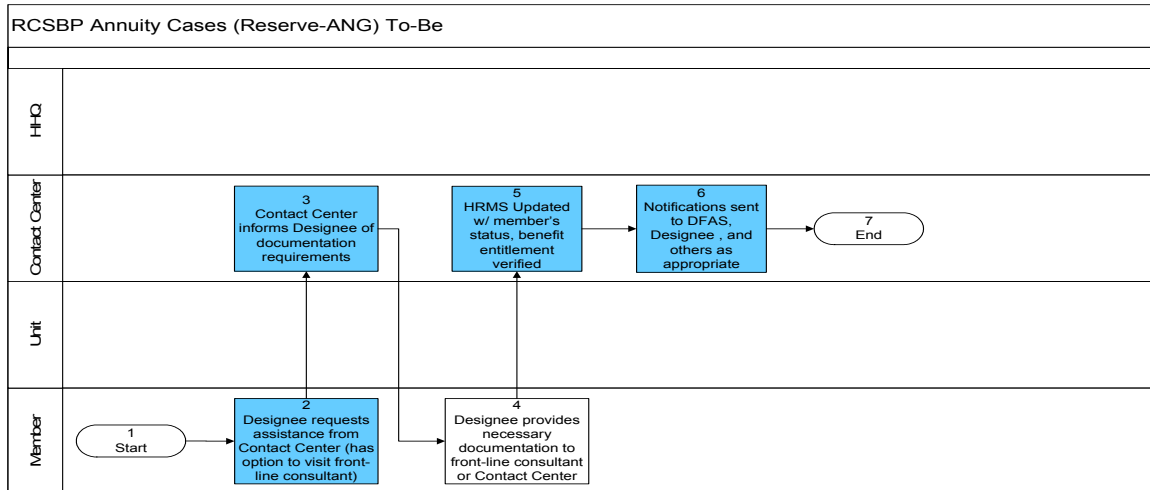


Figure 5-16. To-Be Flowchart

Comparison of As-Is and To-Be for Processes RCSBP Annuity Cases				
Cycle Time Compression	Process Time	Compression Factor		Change
	HR Time	1.25		20%
Cycle Time Reduction	Days	As-Is 15 days	To-Be 12 days	Change Decreased by 3 days
	Time	120 minutes	70 minutes	-50 minutes
Average Process Time	Count	180	180	No change
	Frequency	Annual	Annual	No change

Figure 5-17. Comparison of As-Is and To-Be

5.2.3 System Fit-Gap Analysis

To-Be Process Flow	Initiate	Create	Coord	Certify	Update	Archive	Produce Document
MILPDS	N	N	N	N	N	N	N
DIMHRS	Not specifically addressed in DIMHRS use case						
PeopleSoft	N	M	Y	N	Y	N	M
Oracle	N	Y	Y	N	Y	Y	M
CMS	N	Y	Y	Y	N	Y	Y

C = Customization of COTS software recommended

N = Not available

M = Modification of COTS software recommended

Y = Available in software

Figure 5-18. System Fit-Gap Analysis

5.2.4 Data Element Fit-Gap Analysis

See Annexes B and C for list of data items.

5.2.5 Strategy and Phasing

Total Force	Short-Term	Mid-Term	Long-Term
Military	CMS	DIMHRS	DIMHRS Plus

Figure 5-19. Strategy and Phasing

5.2.6 Compliance Matrix

Reference Name	Reference Title	Affected by Changed Process
AFI 36-2102	Base Level Relocation Procedures	Yes
AFI 36-2110	Assignments	No
AFI 36-2606	Reenlistments in the USAF	Yes
AFRCI 36-201	Air Reserve Technician (ART) Officer-Extension to Mandatory Separation Date	Yes
ANGI 36-2101	The Active Guard/Reserve (AGR) Program	Yes
ANGI 36-3201	Air National Guard Separations Documents	Yes
AFCSM 36-699, Vol. 1	Personnel Data Systems	Yes
ARPCI 36-3203	Computation of USAFR Retired Pay	Yes
ARPCM 36-2603	Air Force Reserve Enlisted Incentives	Yes
DFAS DEM 7073-1/3	Defense Joint Military Pay System-AC/RC	No
DOD FMR, Vol. 7a	DOD Financial Management Regulation	Yes
AFI 36-3203	Service Retirements	Yes
AFI 36-3204	Procedures for Applying as a Conscientious Objector	Yes
AFI 36-3205	Applying for the Palace Chase and Palace Front Programs	Yes
AFI 36-3207	Separating Commissioned Officers	Yes
AFI 36-3208	Administrative Separation of Airmen	Yes
AFI 36-3209	Separation and Retirement Procedures for Air National Guard and Air Force Reserve Members	Yes
AFI 36-3212	Physical Evaluation for Retention, Retirement, and Separation	Yes

Figure 5-20. Compliance Matrix

5.2.7 Assessment of Who Should Do the Work

The action to complete this process is neither Inherently Governmental nor Military Essential. See Section 11 for additional details.

5.2.8 Risks and Mitigation

Threat/Risk Title: Adverse Impact on Service Culture

Description: Change always carries some risk, but the Lab anticipates little impact. However, care must be taken to ensure that all changes are well communicated and that any necessary training is accomplished.

Probability: Low **Impact:** Low

Mitigation: CSTO will develop and implement an appropriate communications and training plan.

Threat/Risk Title: Portal Development/Evolution Does Not Keep Pace with CST Timeline

Description: Portal development must keep pace with the demands of CST implementation. If the Portal is not ready for redesigned CST applications, their implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement and financial support may be required to keep the CST project on track.

Threat/Risk Title: DIMHRS Is Cancelled or Significantly Delayed

Description: The DIMHRS project may be cancelled or significantly delayed, making it unable to support CST.

Probability: Moderate **Impact:** Low

Mitigation: Develop a contingency plan based on COTS technology for implementing CST processes if DIMHRS is delayed and/or cancelled.

5.2.9 Training Need and Potential Career Field Impact

Training may need to be modified to reflect new processing changes and/or to prepare individuals to use the process and capabilities. The changes within this process are expected to have moderate career field impact.

5.2.10 Metrics

The overarching objectives of Customer Service Transformation apply to all processes within this business area and are adequately measured using the following metrics:

- ◆ Customer satisfaction
- ◆ Self-service applications available via Portal and Contact Center
- ◆ Self-service transactions (as percent of total)
- ◆ Manpower savings

5.2.11 Benefits Analysis

5.2.11.1 Service Delivery Model

Method	As-Is	To-Be
Front-Line Support	100%	1%
Contact Center	0%	57%
Portal	0%	42%
Total	100%	100%

Figure 5-21. Service Delivery Model

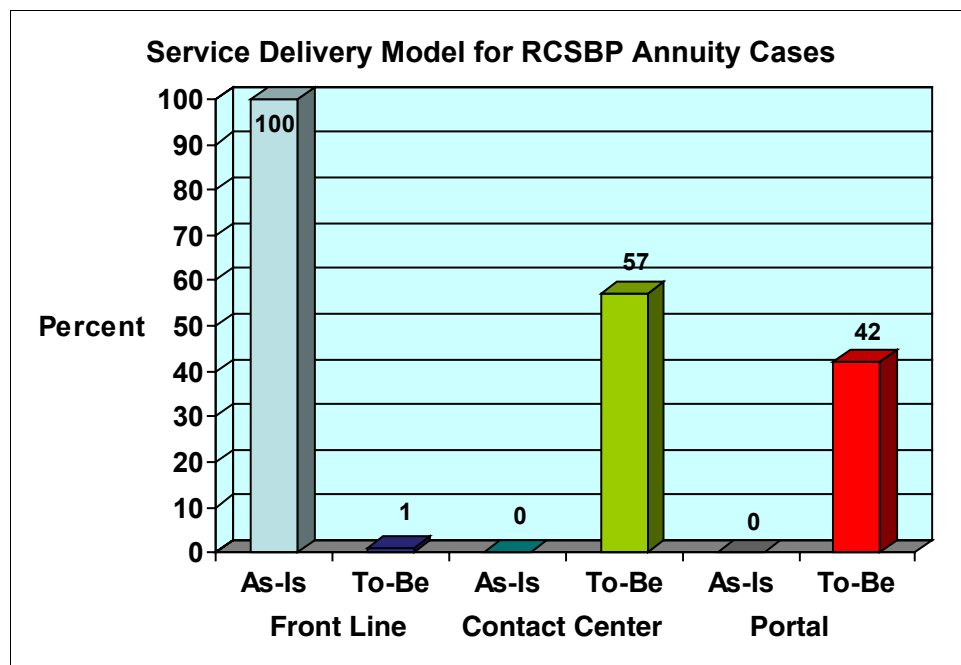


Figure 5-22. Service Delivery Model

Category	Units	To-Be
HR Workload Change	Time	Decreased by 42%
Customer Workload Change	Time	Decreased by 10%
Cycle Time Compression	Days	Decreased by 20% Process Decreased by 40% HR
Web Empowerment	Time	42%
Improve Effectiveness		Accountability and tracking; access time; increased functionality, accuracy, reliability, and morale

Figure 5-23. Lab Benefits Estimate

5.3 Processes Civilian Disability Retirement Action

5.3.1 As-Is Process Narrative

5.3.1.1 Processes Civilian Disability Retirement Action (AFPC)

Describes the procedures required to complete and process the disability/optional retirement application, including coordination with OPM.

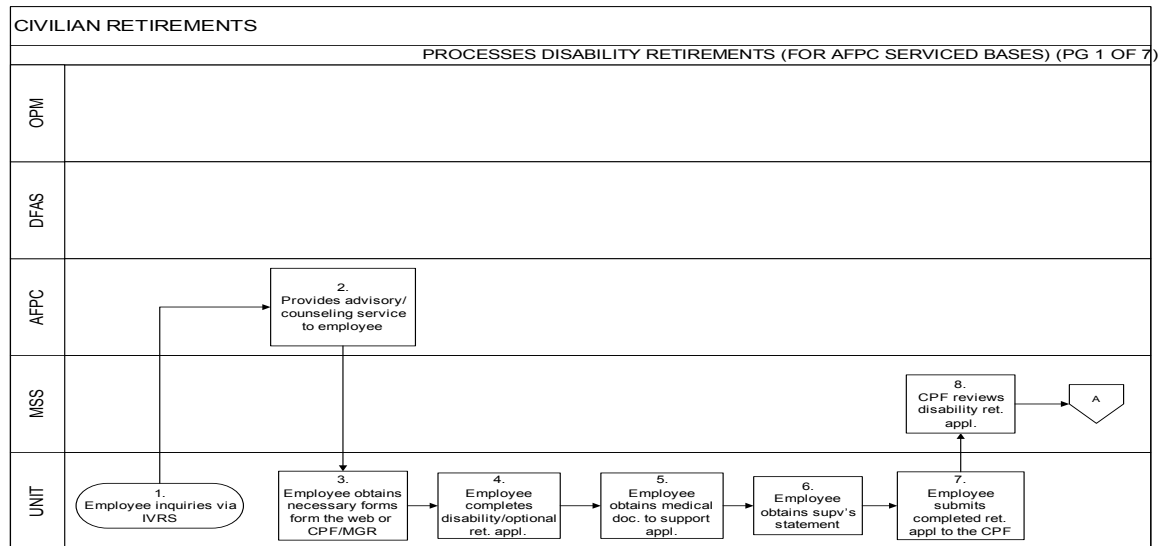


Figure 5-24. As-Is Flowchart (page 1 of 7)

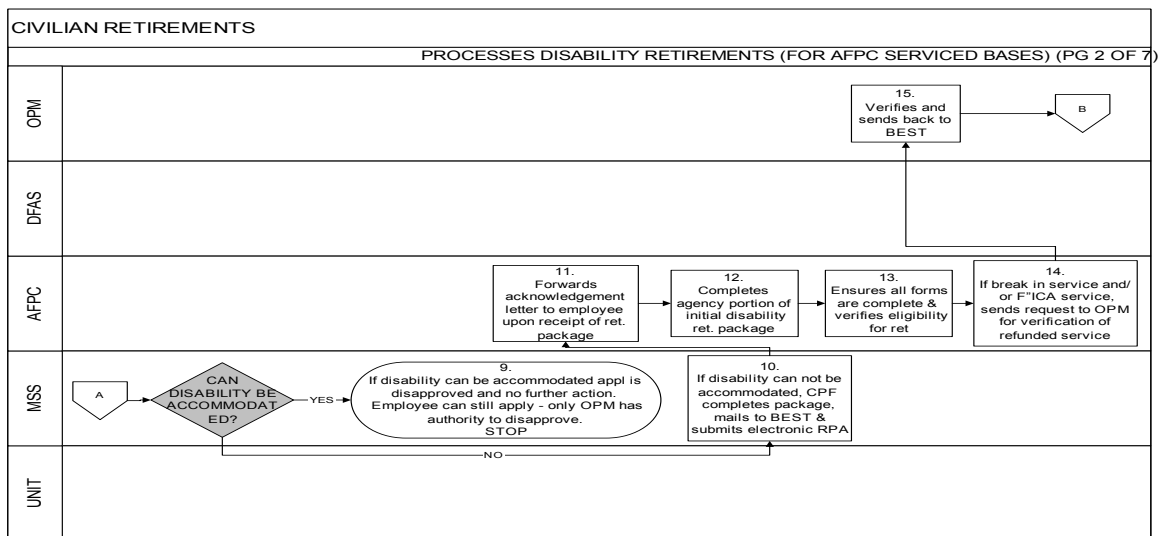


Figure 5-25. As-Is Flowchart (page 2 of 7)

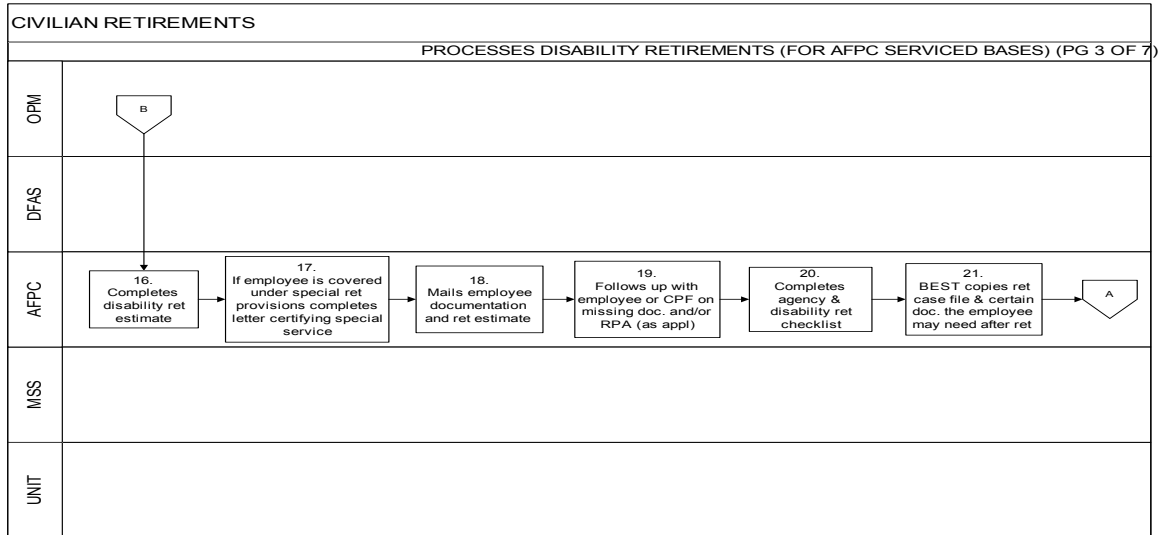


Figure 5-26. As-Is Flowchart (page 3 of 7)

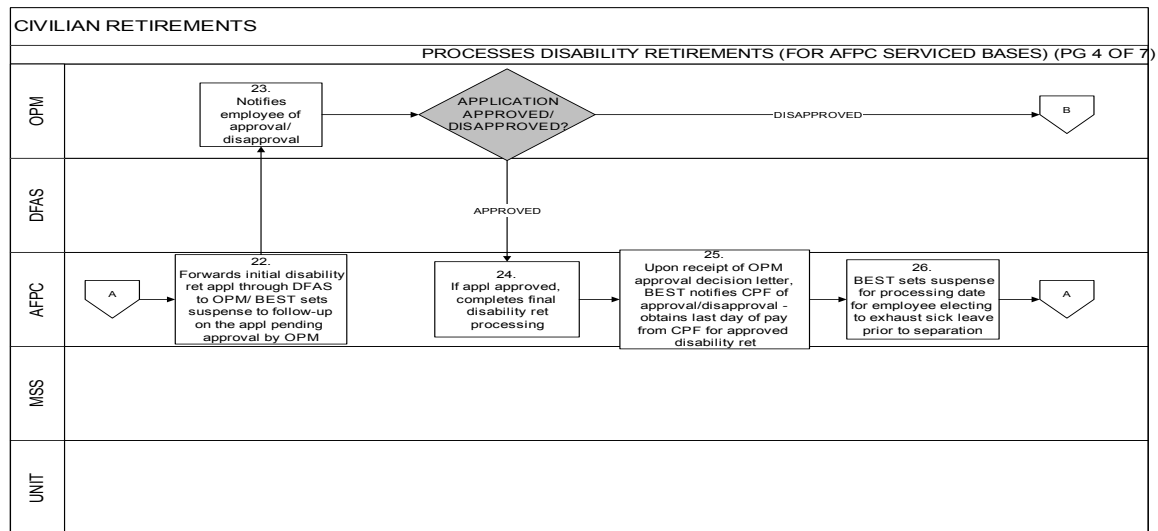


Figure 5-27. As-Is Flowchart (page 4 of 7)

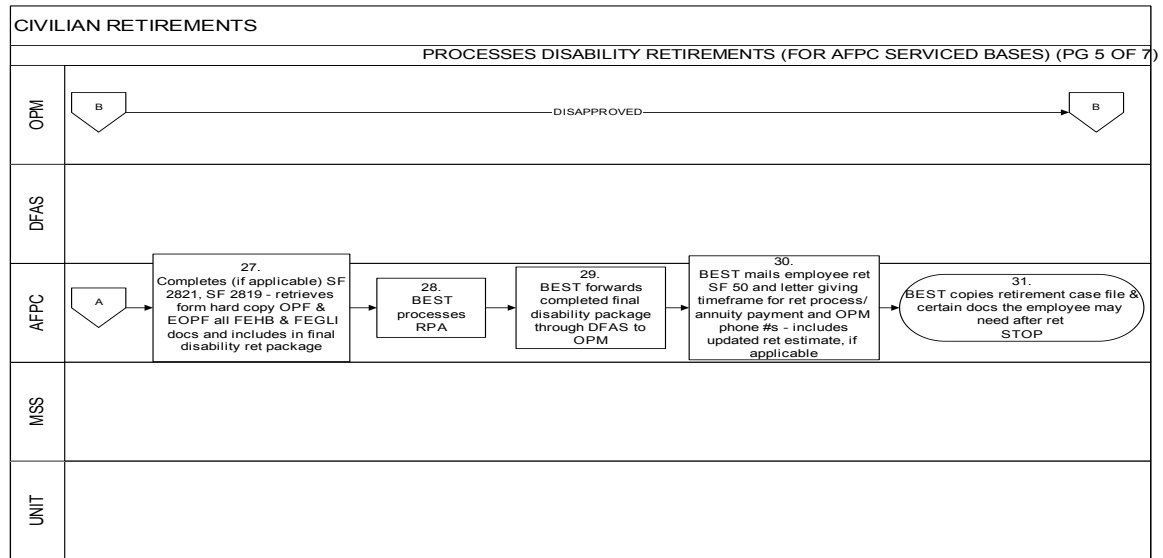


Figure 5-28. As-Is Flowchart (page 5 of 7)

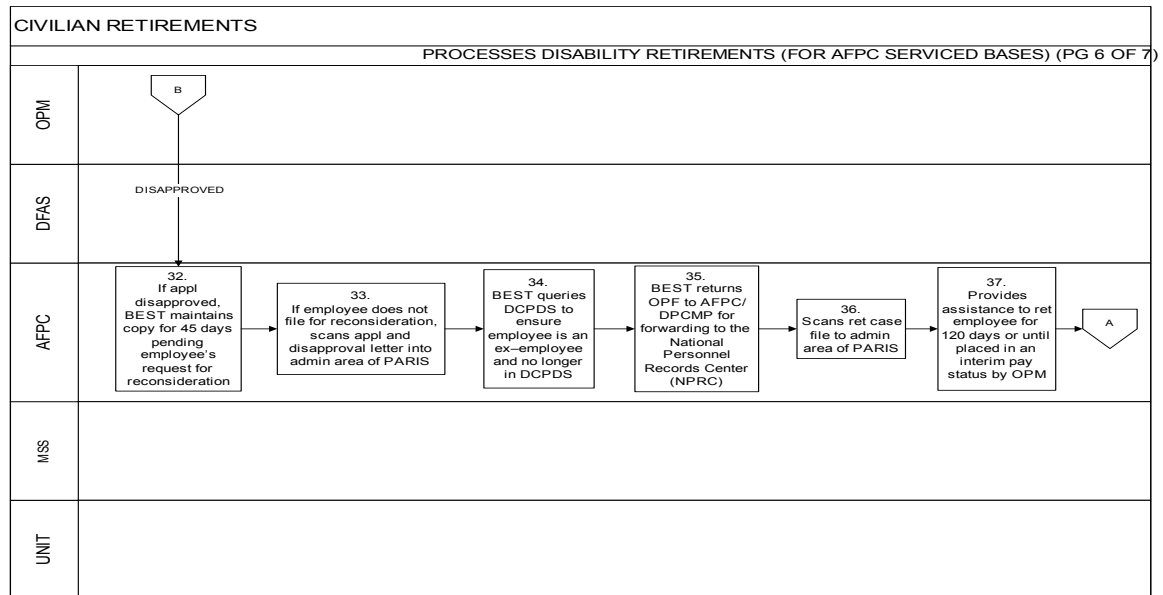


Figure 5-29. As-Is Flowchart (page 6 of 7)

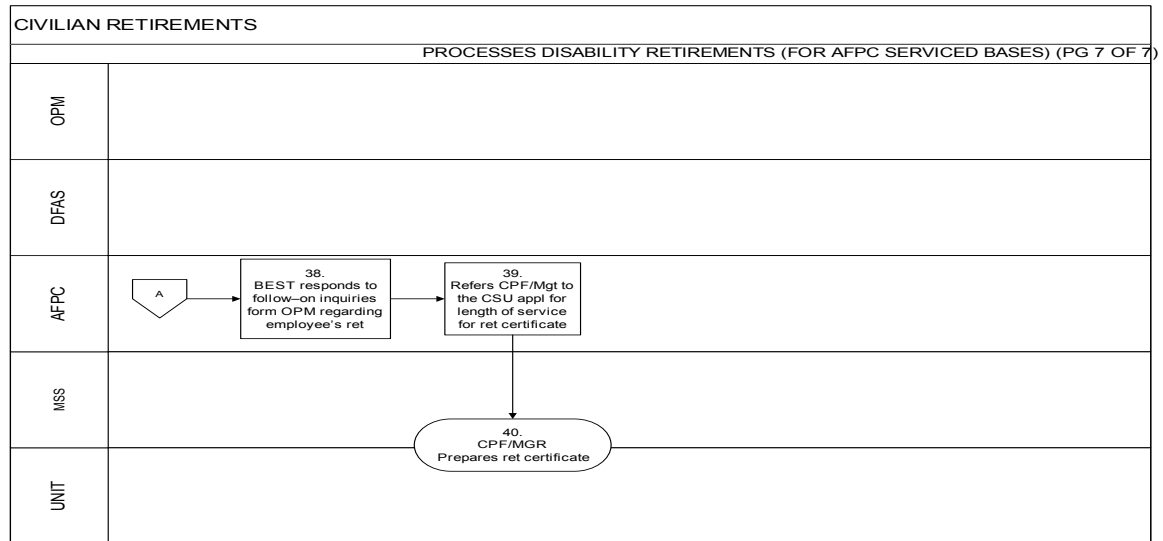


Figure 5-30. As-Is Flowchart (page 7 of 7)

As-Is Level of Effort for Processes Civilian Disability Retirement Action	
Cycle Time	126 days
HR Process Time	1,069 minutes
Count and Frequency	250 annually

Figure 5-31. As-Is Level of Effort

5.3.2 To-Be Process Narrative

In the To-Be process, the member initiates a disability retirement application online. The base-level front-line consultant scans or mails medical documentation.

The front line consultant receives the information and consults with base agencies to determine whether the member's disability can be accommodated. Accommodations may consist of adjustments to the working conditions/environment or reassignment to different duties for which the member may be qualified. If the disability can be accommodated, the front line consultant notifies the appropriate offices. If the disability cannot be supported, the front line consultant notifies the appropriate offices and the member follows the civilian retirement process procedures. If the member disagrees with the determination of accommodation, the front line consultant adds his or her to the disability retirement application and the package goes forward to decision authorities.

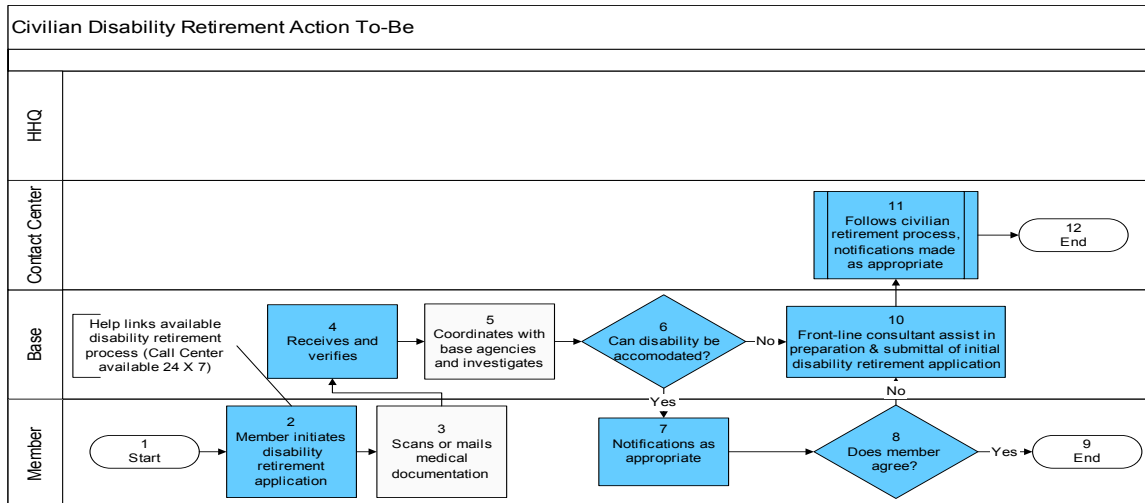


Figure 5-32. To-Be Process Flowchart

Comparison of As-Is and To-Be for Civilian Disability Retirement Action				
Cycle Time Compression	Process Time	Compression Factor		Change
	HR Time	1		0%
Cycle Time Reduction	As-Is	To-Be		Change
	Days	126		Decreased by 0 days
Average Process Time	Time	1,069 minutes		-107 minutes
	Count	250		No change
	Frequency	Annual		No change

Figure 5-33. Comparison of As-Is and To-Be

5.3.3 System Fit-Gap Analysis

To-Be Process Flow	Initiate	Create	Coord	Certify	Update	Archive	Produce Document
DCPDS	N	Y	Y	Y	Y	Y	Y
DCPDS Plus	N	Y	Y	Y	Y	Y	Y

C = Customization of COTS software recommended N = Not available
M = Modification of COTS software recommended Y = Available in software

Figure 5-34. System Fit-Gap Analysis

5.3.4 Data Element Fit-Gap Analysis

No change envisioned to DCPDS data elements.

5.3.5 Strategy and Phasing

Total Force	Short-Term	Mid-Term	Long-Term
Civilian	DCPDS	DCPDS	DCPDS Plus

Figure 5-35. Strategy and Phasing

5.3.6 Compliance Matrix

Reference Name	Reference Title	Affected by Changed Process
5 CFR 831	Retirement	No
5 CFR 841	Federal Employees' Retirement System—General Administration	No
5 CFR 842	Federal Employees' Retirement System—Basic Annuity	No
5 CFR 843	Federal Employees' Retirement System—Death Benefits and Employee Refunds	No
5 CFR 844	Federal Employees' Retirement System—Disability Retirement	No
5 CFR 845	Federal Employees' Retirement System—Debt Collection	No
5 CFR 846	Federal Employees' Retirement System—Elections of Coverage	No
5 USC Ch. 83	Retirement	No
5 USC Ch. 84	Reduction in Force	No
5 CFR 550.101	Pay Administration	No
AFPD 36-8	Employee Benefits and Entitlements	No
	AFPC Procedural Guide	Yes
OPM Handbook	CSRS and FERS Handbook for Personnel and Payroll Offices	Yes

Figure 5-36. Compliance Matrix

5.3.7 Assessment of Who Should Do the Work

The action to complete this process is neither Inherently Governmental nor Military Essential. See Section 11 for additional details.

5.3.8 Risks and Mitigation

Threat/Risk Title: Adverse Impact on Service Culture

Description: Change always carries some risk, but the Lab anticipates little impact. However, care must be taken to ensure that all changes are well communicated and that any necessary training is accomplished.

Probability: Low **Impact:** Low

Mitigation: CSTO will develop and implement an appropriate communications and training plan.

Threat/Risk Title: Portal Development/Evolution Does Not Keep Pace with CST Timeline

Description: Portal development must keep pace with the demands of CST implementation. If the Portal is not ready for redesigned CST applications, their implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement and financial support may be required to keep the CST project on track.

Threat/Risk Title: OPM E-Business Timeline Does Not Keep Pace with CST Timeline

Description: The OPM e-business timeline may not keep pace with the requirements of CST implementation. If OPM is not ready for redesigned CST applications, new process implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement may be required to interface with OPM to keep the CST project on track.

5.3.9 Training Need and Potential Career Field Impact

Training may need to be modified to reflect new processing changes and/or to prepare individuals to use the process and capabilities. The changes within this process are expected to have minimal career field impact.

5.3.10 Metrics

The overarching objectives of Customer Service Transformation apply to all processes within this business area and are adequately measured using the following metrics:

- ◆ Customer satisfaction
- ◆ Self-service applications available via Portal and Contact Center
- ◆ Self-service transactions (as percent of total)
- ◆ Manpower savings.

5.3.11 Benefits Analysis

5.3.11.1 Service Delivery Model

Method	As-Is	To-Be
Front-Line Support	40%	40%
Contact Center	60%	50%
Portal	0%	10%
Total	100%	100%

Figure 5-37. Service Delivery Model

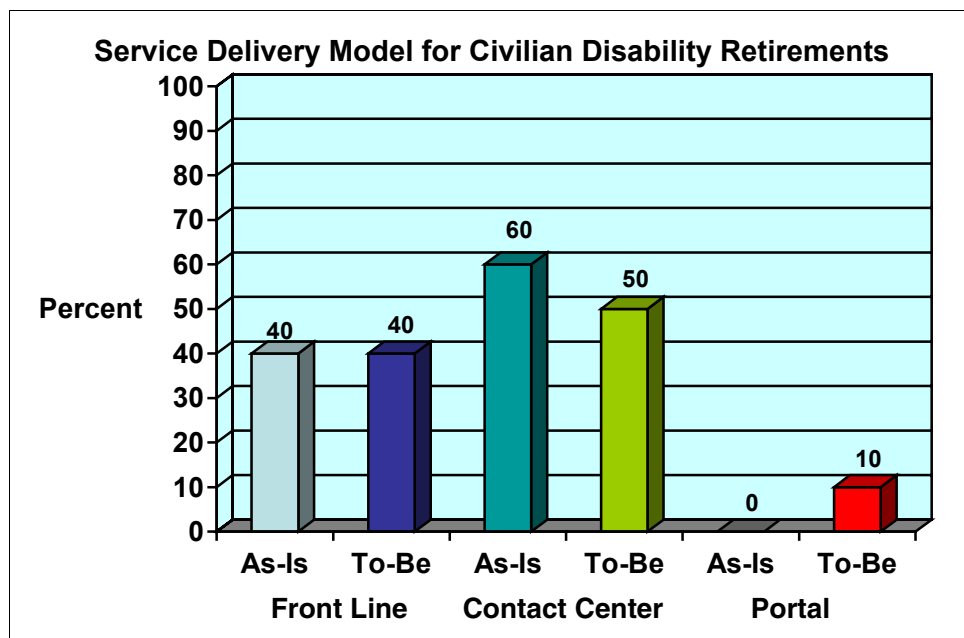


Figure 5-38. Service Delivery Model

Category	Units	To-Be
HR Workload Change	Time	Decreased by 10%
Customer Workload Change	Time	Decreased by 5%
Cycle Time Compression	Days	Decreased by 0% Process Decreased by 10% HR
Web Empowerment	Time	10%
Improve Effectiveness		Access time; increased functionality, accuracy, reliability, and morale

Figure 5-39. Lab Estimate

5.4 Processes Civilian Retirements

5.4.1 As-Is Process Narratives

5.4.1.1 Processes Voluntary Retirements (AFPC)

Describes the procedures required to process voluntary retirements from initial application through coordination with OPM.

5.4.1.2 Processes Discontinued Service Retirement Involuntary Separations, Reduction-In-Force, and Non-Disciplinary Actions (AFPC)

Describes the procedures required to complete and process discontinued service retirements.

5.4.1.3 Processes Voluntary Early Retirements (VERA) and Voluntary Separation Incentive Payment (VSIP) (AFPC)

Describes the procedures required to process voluntary early retirements and voluntary separation payments.

5.4.1.4 Processes Mandatory Retirements (AFPC)

Describes the processes required to process mandatory retirements from the employee acknowledgement letter through completion of the retirement certificate.

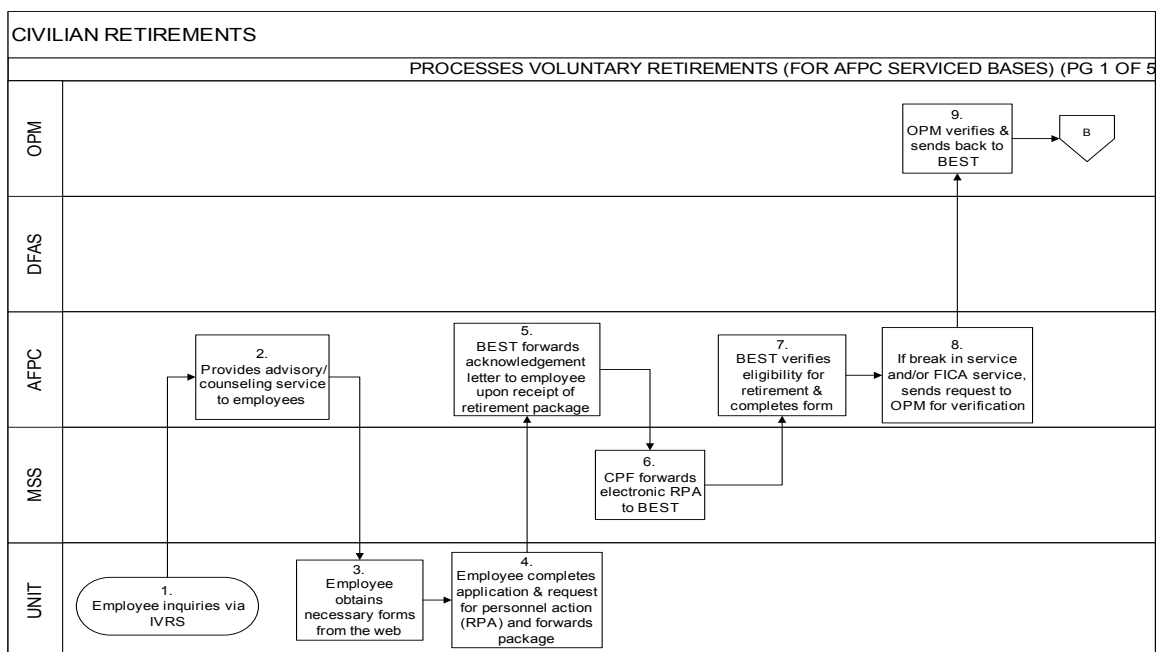


Figure 5-40. As-Is Flowchart (page 1 of 5)

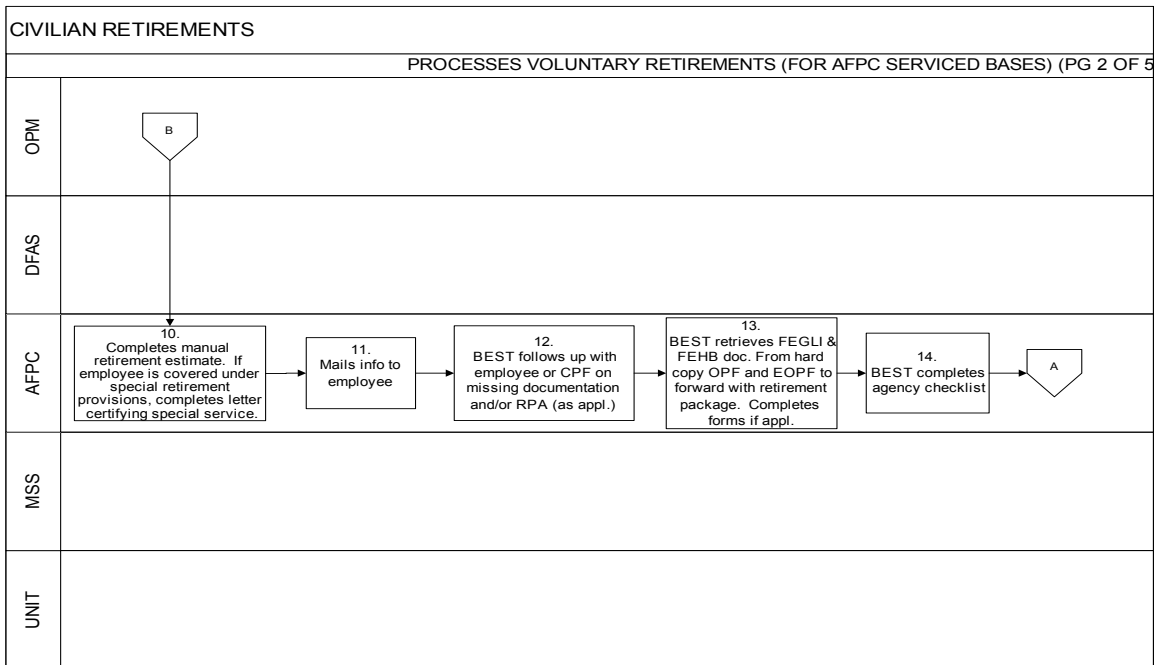


Figure 5-41. As-Is Flowchart (page 2 of 5)

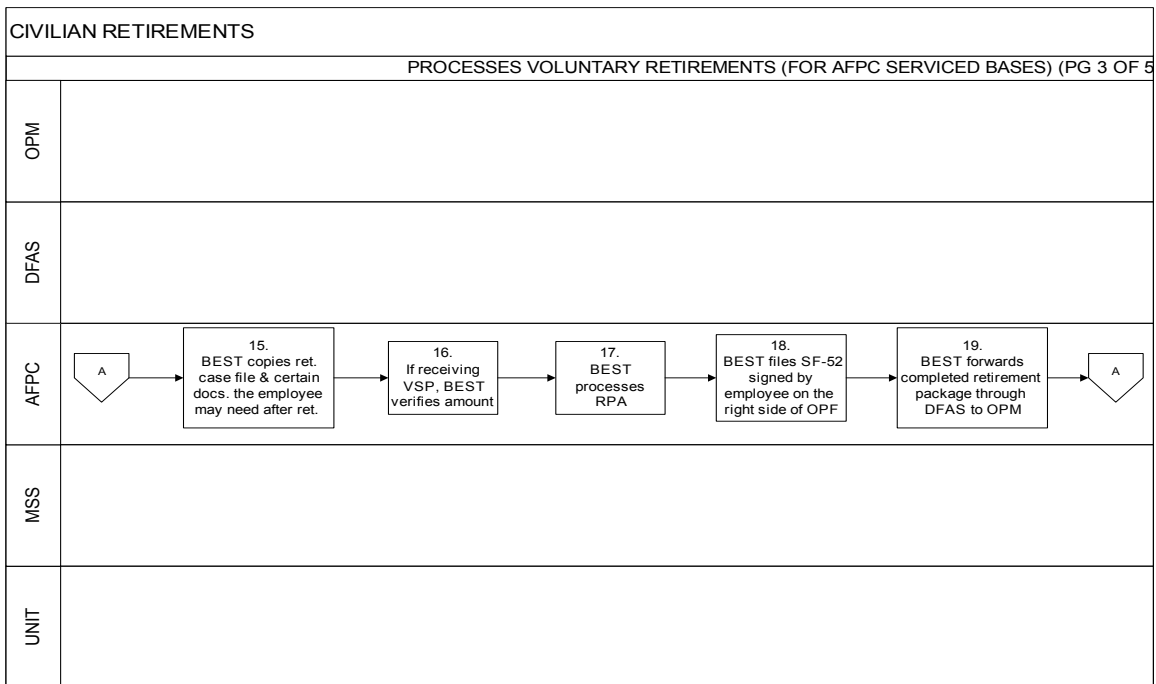


Figure 5-42. As-Is Flowchart (page 3 of 5)

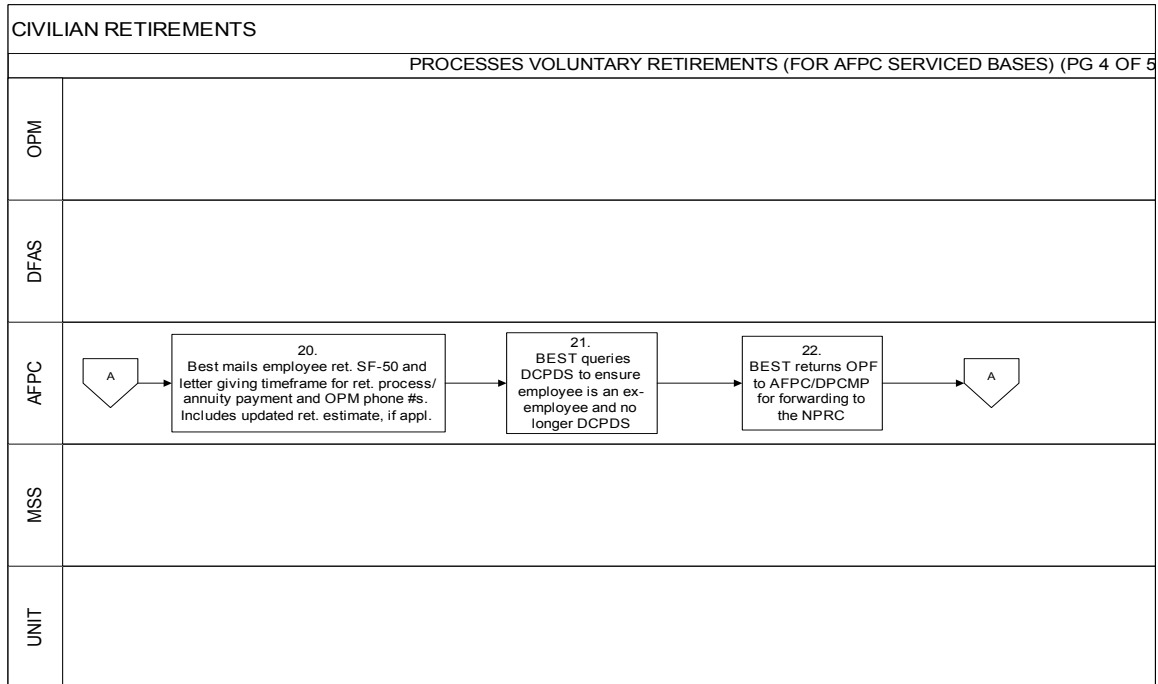


Figure 5-43. As-Is Flowchart (page 4 of 5)

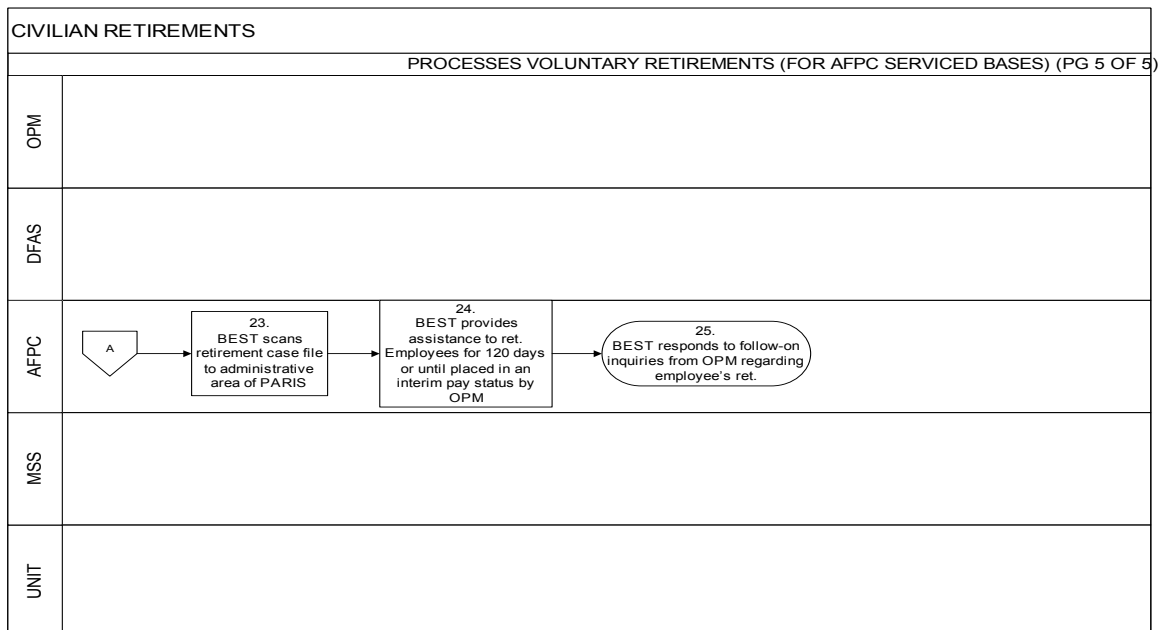


Figure 5-44. As-Is Flowchart (page 5 of 5)

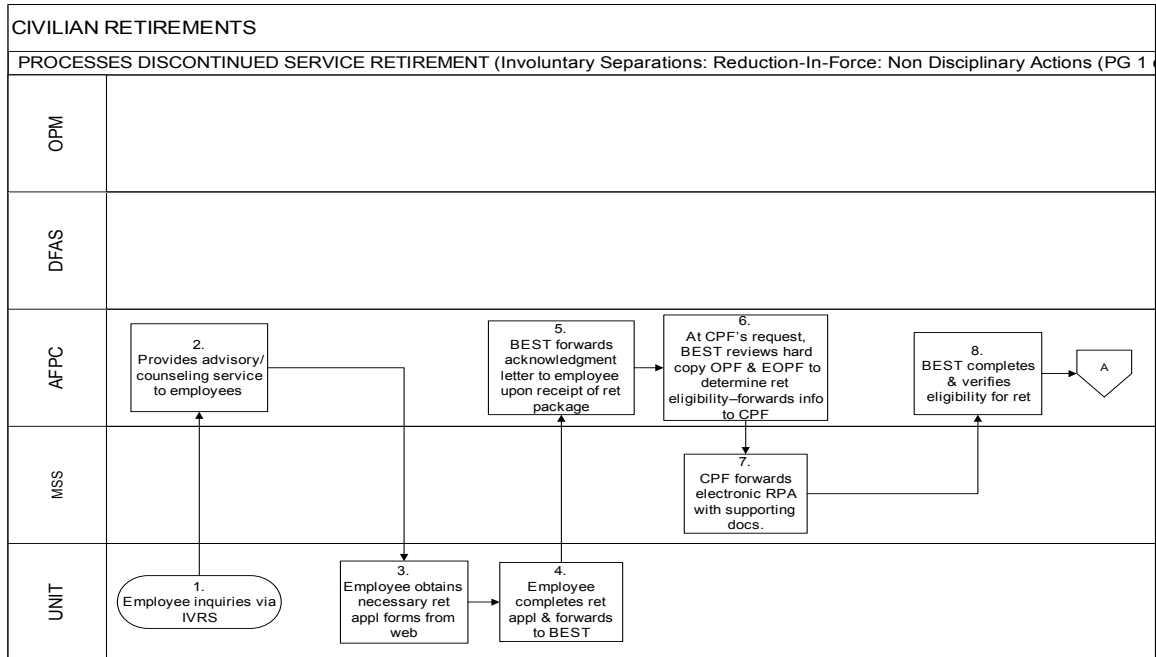


Figure 5-45. As-Is Flowchart (page 1 of 4)

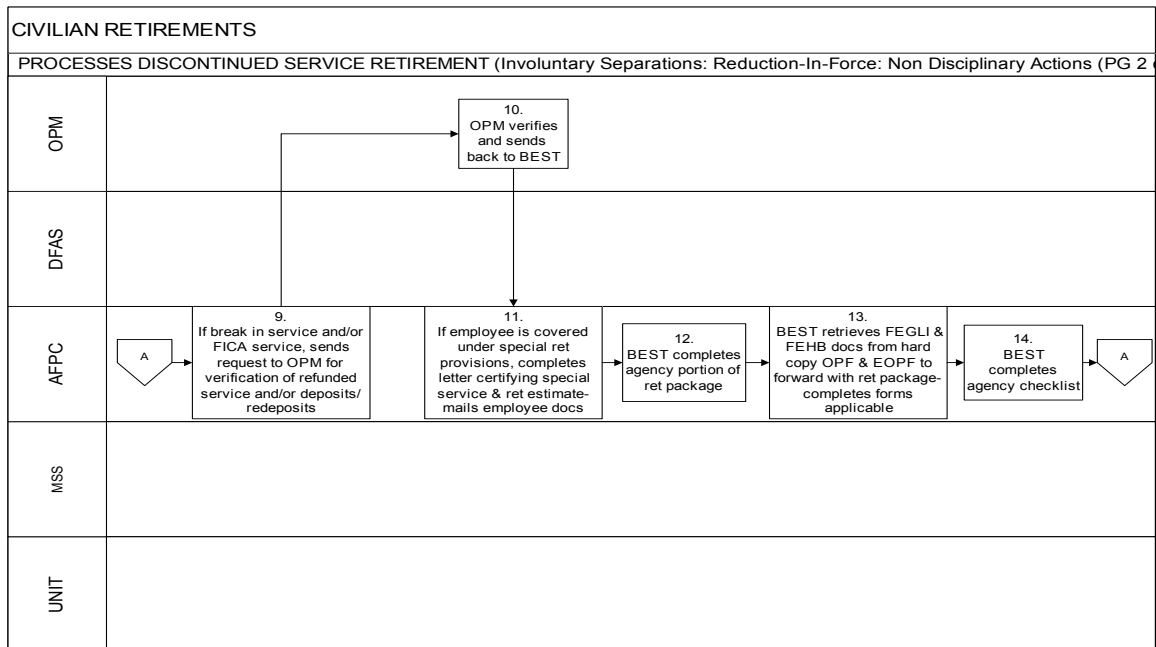


Figure 5-46. As-Is Flowchart (page 2 of 4)

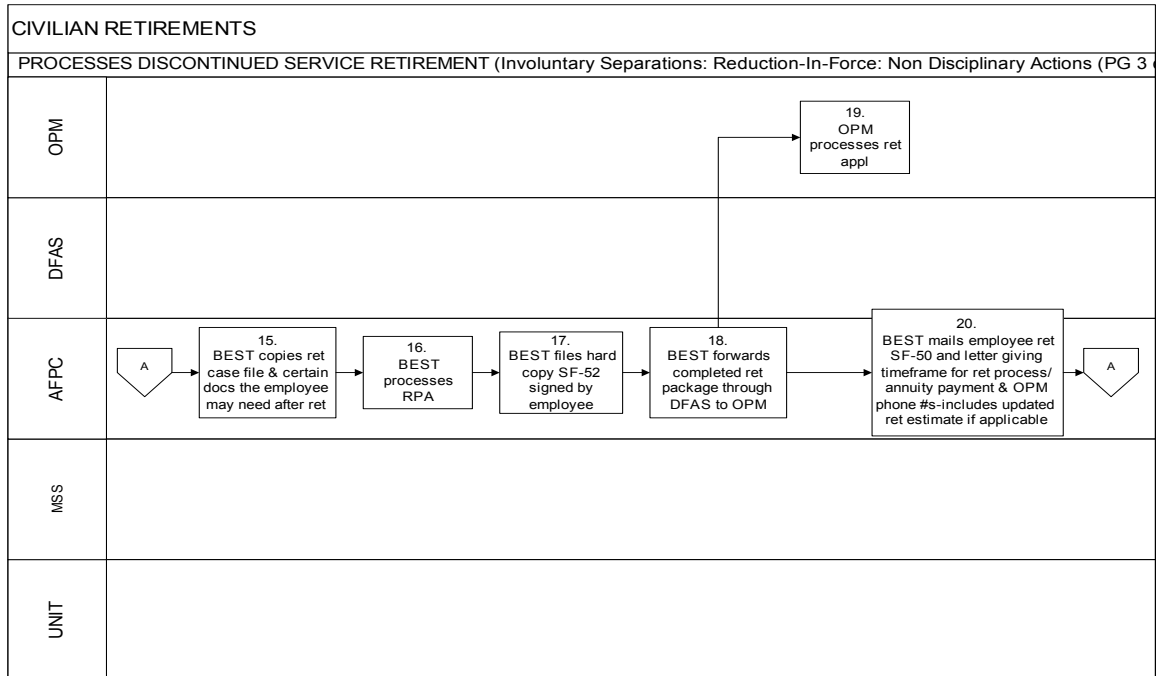


Figure 5-47. As-Is Flowchart (page 3 of 4)

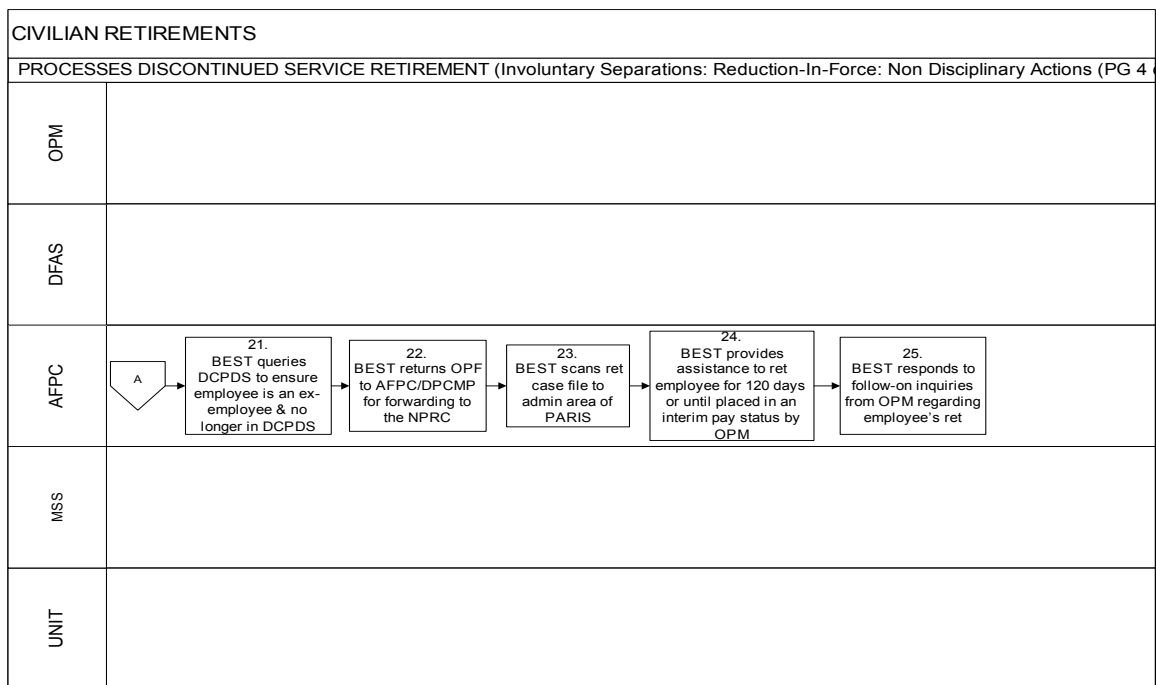


Figure 5-48. As-Is Flowchart (page 4 of 4)

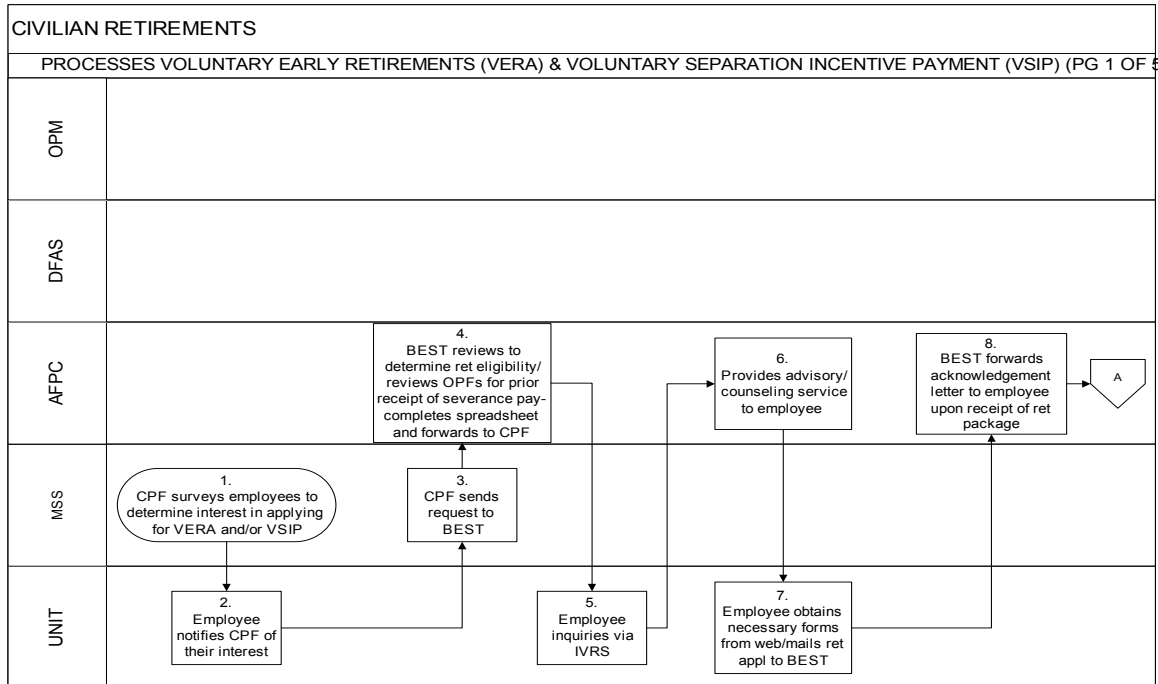


Figure 5-49. As-Is Flowchart (page 1 of 5)

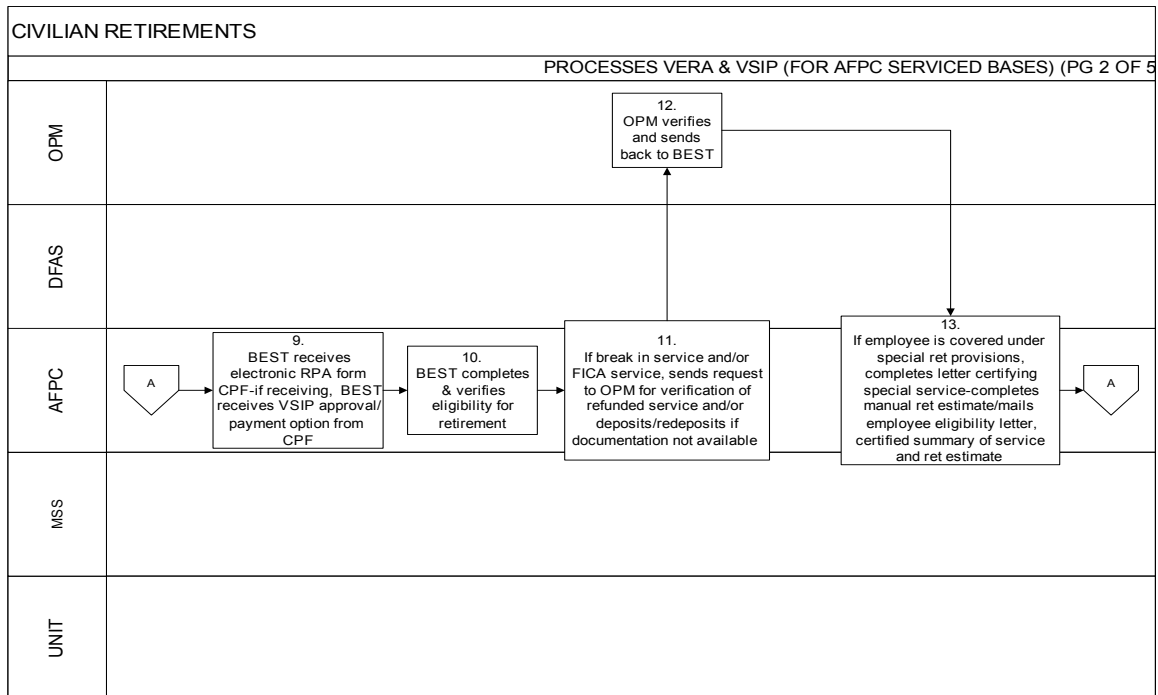


Figure 5-50. As-Is Flowchart (page 2 of 5)

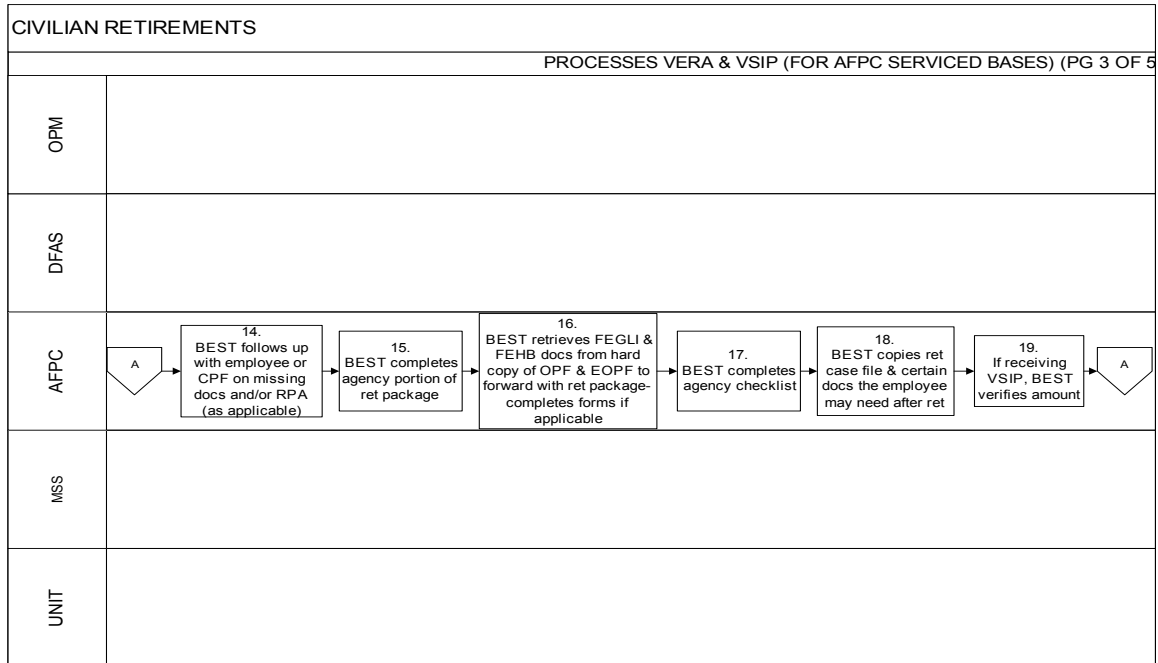


Figure 5-51. As-Is Flowchart (page 3 of 5)

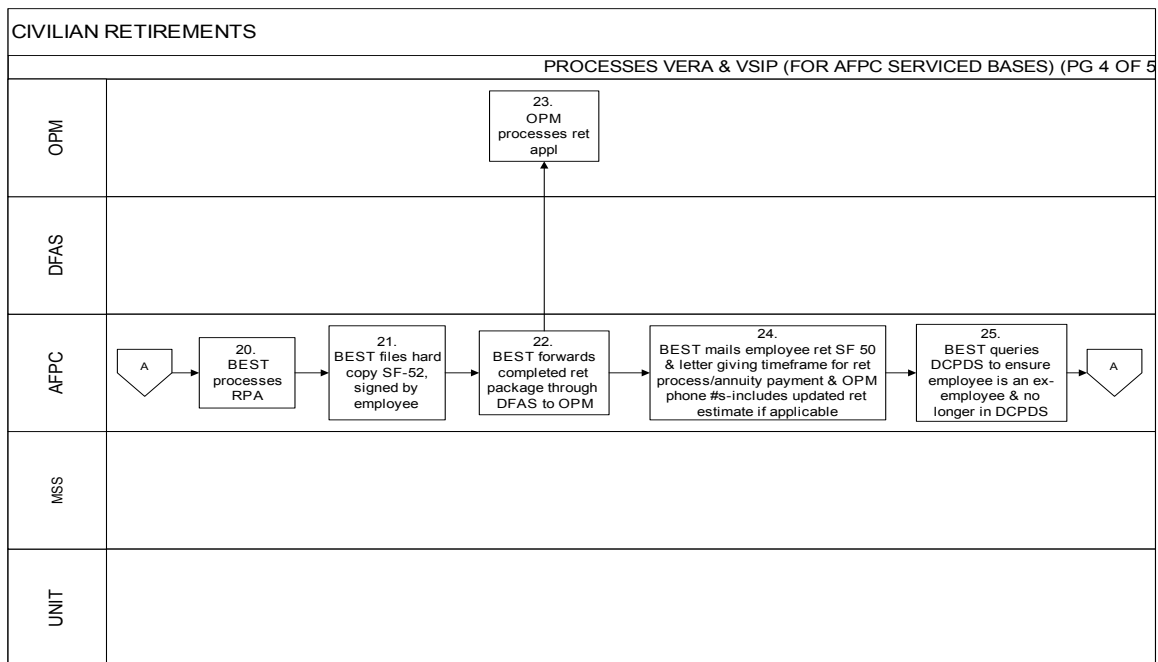


Figure 5-52. As-Is Flowchart (page 4 of 5)

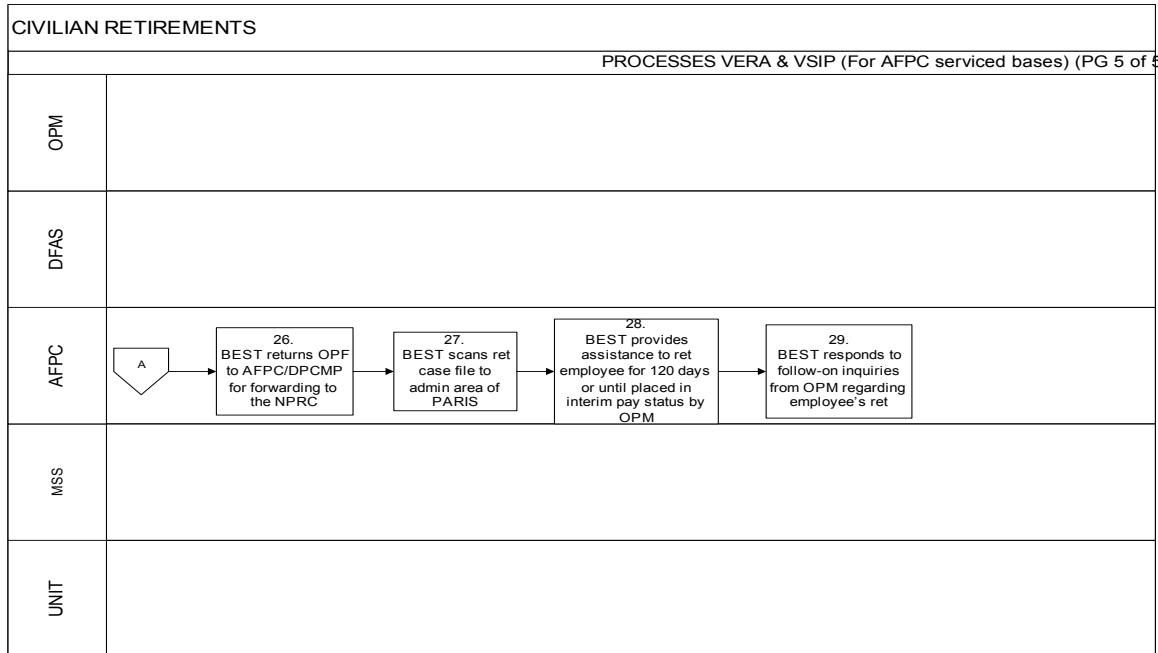


Figure 5-53. As-Is Flowchart (page 5 of 5)

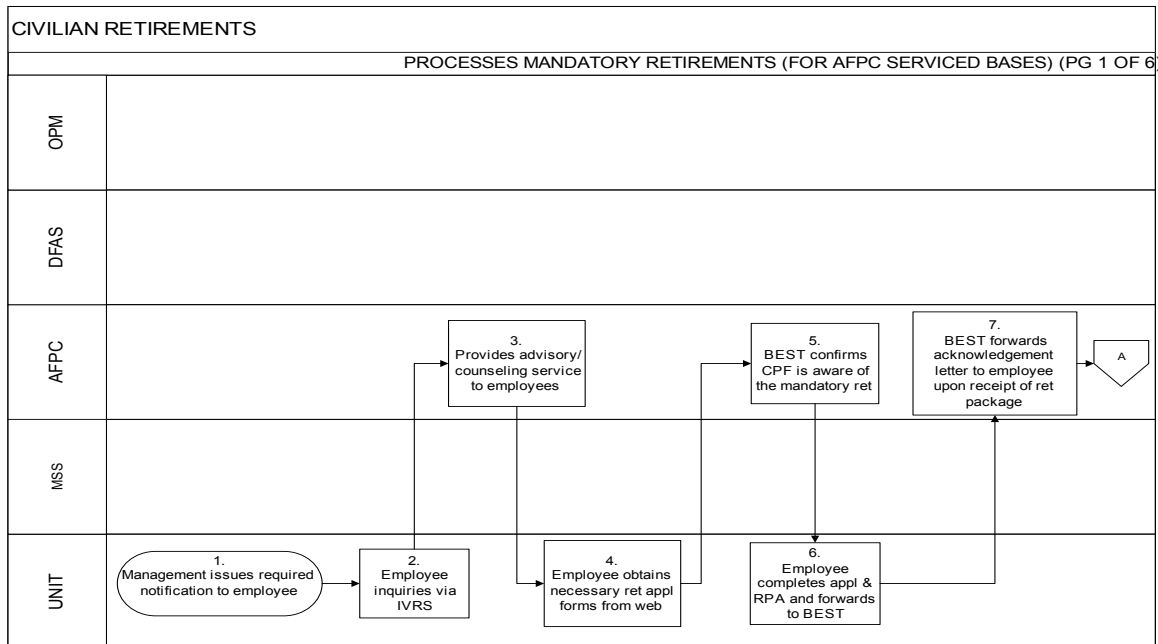


Figure 5-54. As-Is Flowchart (page 1 of 6)

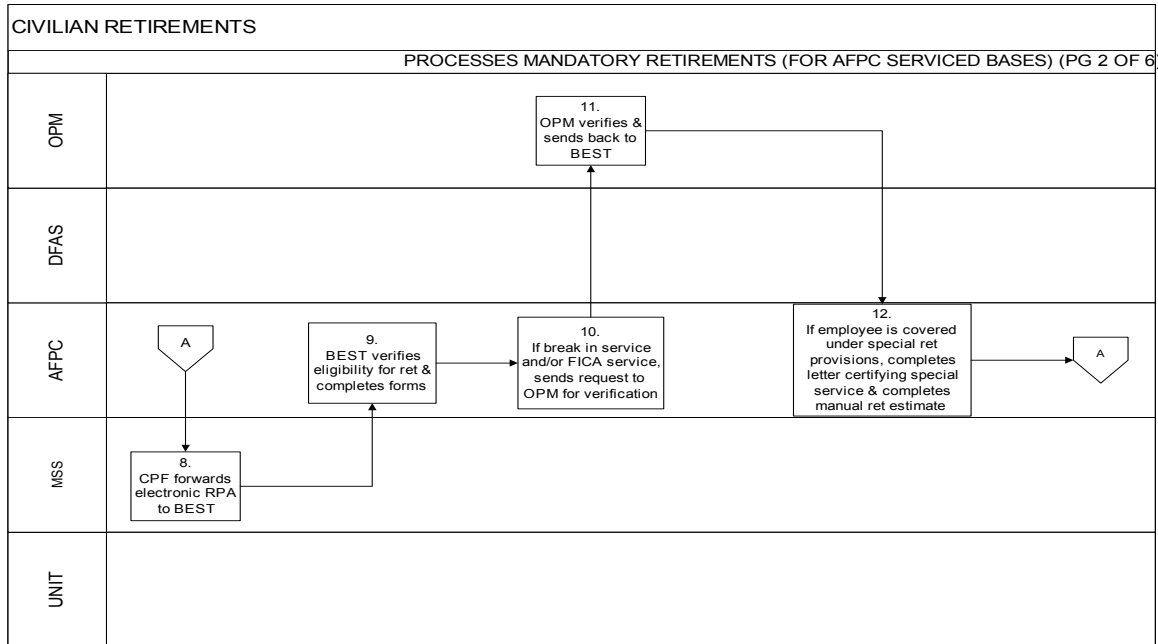


Figure 5-55. As-Is Flowchart (page 2 of 6)

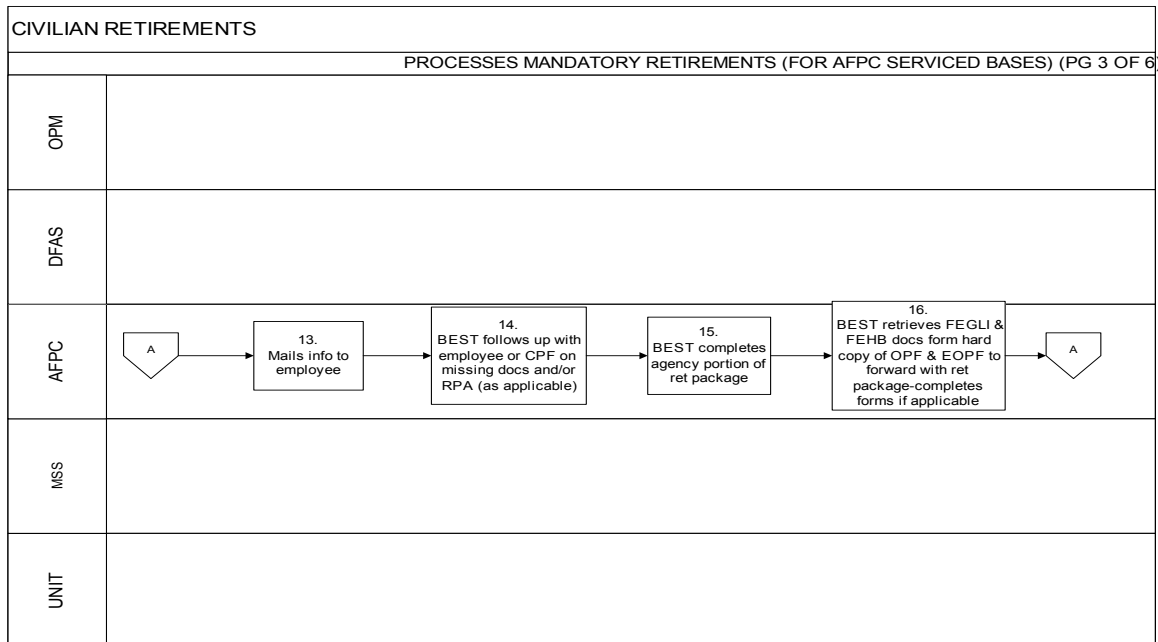


Figure 5-56. As-Is Flowchart (page 3 of 6)

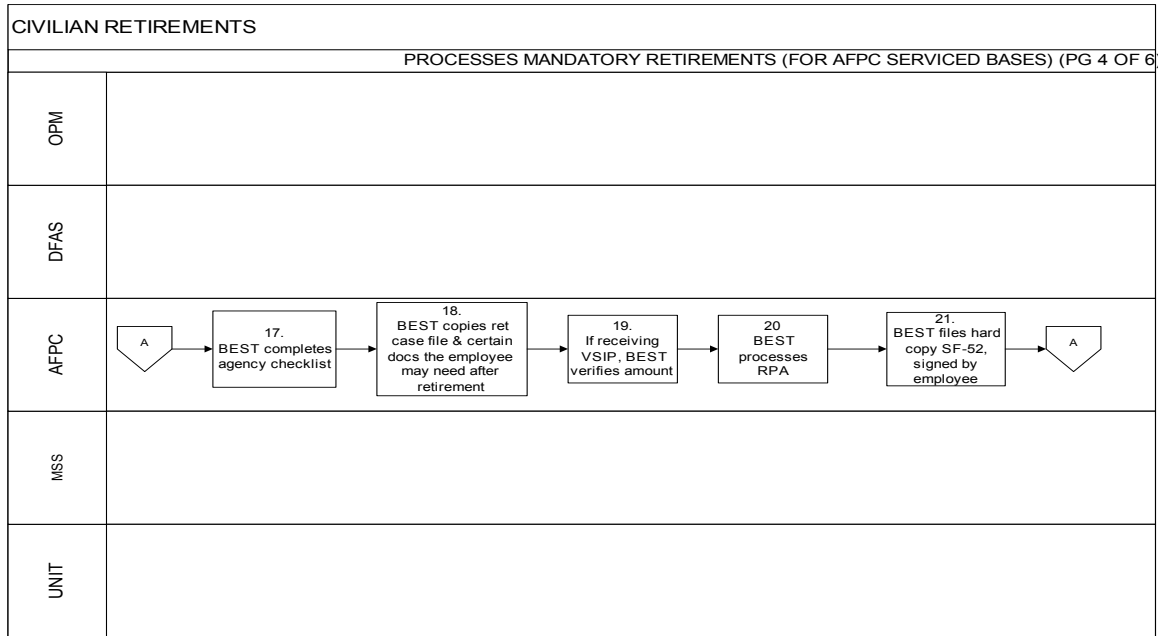


Figure 5-57. As-Is Flowchart (page 4 of 6)

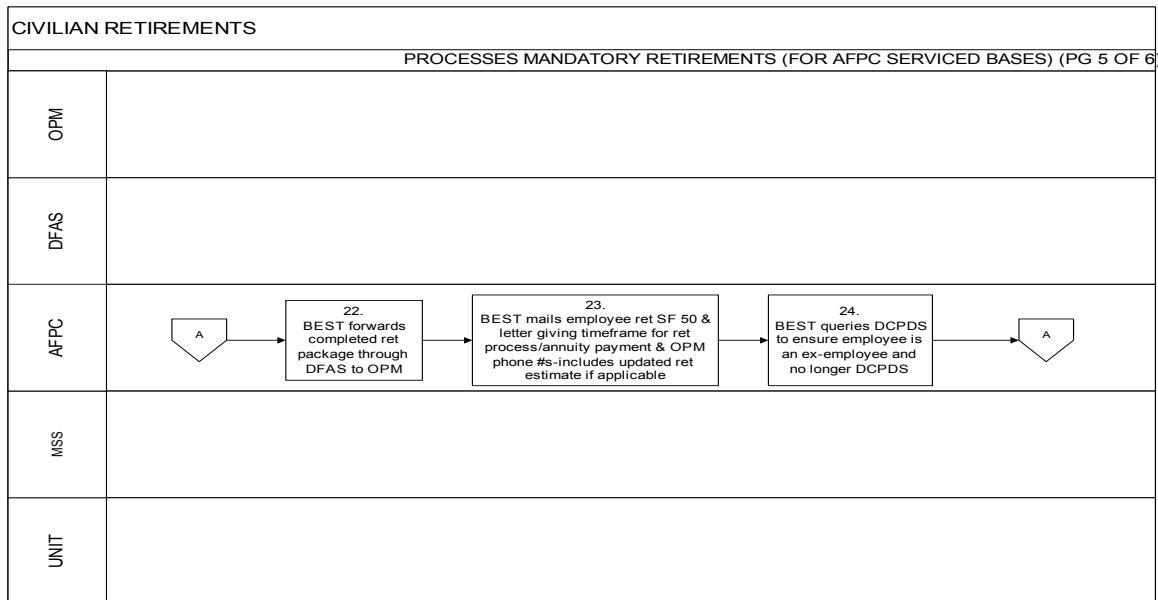


Figure 5-58. As-Is Flowchart (page 5 of 6)

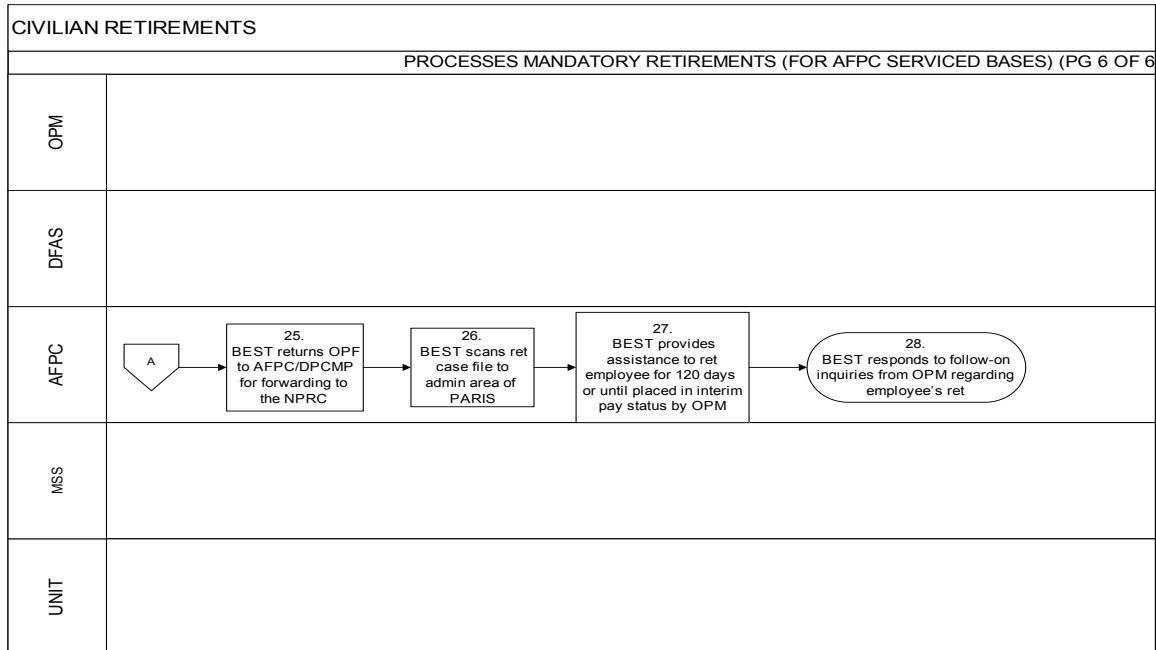


Figure 5-59. As-Is Flowchart (page 6 of 6)

As-Is Level of Effort for Civilian Retirements	
Cycle Time	63 days
HR Process Time	533 minutes
Count and Frequency	2,750 annually

Figure 5-60. As-Is Level of Effort

5.4.2 To-Be Process Narrative

In the To-Be process, the Civilian Personnel Flight staff may initiate involuntary retirement actions as applicable. The member may initiate a voluntary retirement, or receives an in-system notification to initiate an involuntary retirement. In-system notifications the member may receive include voluntary early retirement (VERA), voluntary separation incentive payment (VSIP), reduction in force, involuntary separation, non-disciplinary action, or mandatory retirement.

Help links will be available to assist the member in preparing the retirement e-package. If the member has any problems or questions, he or she can contact the Contact Center on a 24x7 basis.

The system will let the member know whether he or she is eligible to retire or will suggest an eligibility date. This assumes that new processes will be instituted to ensure that all applicable service dates are entered into the system at the time the employee is hired. Retirement estimates and VSIP amount inquiries, if eligible, will be accessible. The member will designate whether he or she wants the final product sent to a personal e-mail address or delivered via certified mail. The member can also elect at this time to have a retirement ceremony. Upon completion, a workflow system will route the e-package to the decision authority. Lab participants also desired the system to inform unit management early in the process of a pending retirement to minimize the amount of time a job goes unfilled. (This is a change from the current process, which unit management is not involved in.)

If the retirement is for disability, the application will be forwarded to OPM for approval. If the package is disapproved, the member will be notified and authorized to address the decision

directly with OPM. If OPM approves the package, the Contact Center will be notified and the package processed as a normal retirement from this point on.

The Contact Center receives the retirement e-package, verifies its contents, and updates the human resource management system (HRMS) and DFAS, with appropriate notifications. The Contact Center completes FEGLI and FEHB documents, a letter certifying special service, the SF-50, and a retirement annuity calculation and e-signs the completed retirement certificate. The package is then sent for OPM adjudication.

If the member elected to have a retirement ceremony, the unit is notified at this time. The member receives the completed retirement e-package through either mail or e-mail

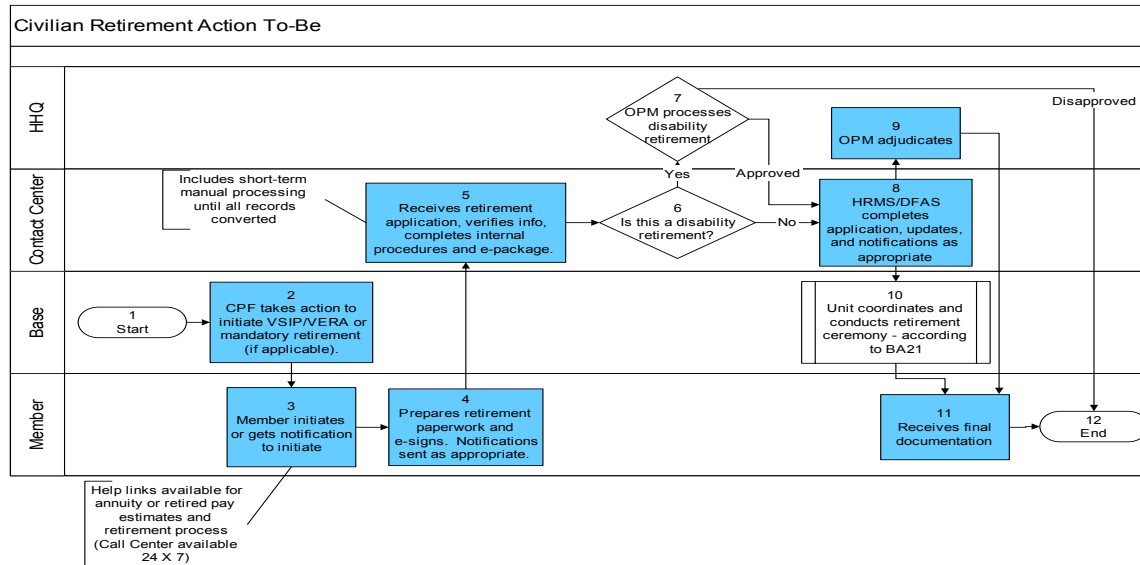


Figure 5-61. To-Be Flowchart

Comparison of As-Is and To-Be for Civilian Retirements				
Cycle Time Compression	Process Time		Compression Factor	Change
	HR Time		1	0%
Cycle Time Reduction	As-Is		To-Be	Change
	Days	63	63	Decreased by 0 days
Average Process Time	Time	533 minutes	426 minutes	-107 minutes
	Count	2,750	2,750	No change
	Frequency	Annual	Annual	No change

Figure 5-62. Comparison of As-Is and To-Be

5.4.3 System Fit-Gap Analysis

To-Be Process Flow	Initiate	Create	Coord	Certify	Update	Archive	Produce Document
DCPDS	N	Y	Y	Y	Y	Y	Y
DCPDS Plus	Y	Y	Y	Y	Y	Y	Y

C = Customization of COTS software recommended

N = Not available

M = Modification of COTS software recommended

Y = Available in software

Figure 5-63. System Fit-Gap Analysis

5.4.4 Data Element Fit-Gap Analysis

No change envisioned to DCPDS data elements.

5.4.5 Strategy and Phasing

Total Force	Short-Term	Mid-Term	Long-Term
Civilian	DCPDS	DCPDS	DCPDS Plus

Figure 5-64. Strategy and Phasing

5.4.6 Compliance Matrix

Reference Name	Reference Title	Affected by Changed Process
5 CFR 831	Retirement	No
5 CFR 841	Federal Employees' Retirement System—General Administration	No
5 CFR 842	Federal Employees' Retirement System—Basic Annuity	No
5 CFR 843	Federal Employees' Retirement System—Death Benefits and Employee Refunds	No
5 CFR 844	Federal Employees' Retirement System—Disability Retirement	No
5 CFR 845	Federal Employees' Retirement System—Debt Collection	No
5 CFR 846	Federal Employees' Retirement System—Elections of Coverage	No
5 USC Ch. 83	Retirement	No
5 USC Ch. 84	Reduction in Force	No
5 CFR 550.101	Pay Administration	No
AFPD 36-8	Employee Benefits and Entitlements	No
	AFPC Procedural Guide	Yes
OPM Handbook	CSRS and FERS Handbook for Personnel and Payroll Offices	Yes

Figure 5-65. Compliance Matrix

5.4.7 Assessment of Who Should Do the Work

The action to complete this process is neither Inherently Governmental nor Military Essential. See Section 11 for additional details.

5.4.8 Risks and Mitigation

Threat/Risk Title: Adverse Impact on Service Culture

Description: Change always carries some risk, but the Lab anticipates little impact. However, care must be taken to ensure that all changes are well communicated and that any necessary training is accomplished.

Probability: Moderate **Impact:** Low

Mitigation: CSTO will develop and implement an appropriate communications and training plan.

Threat/Risk Title: Portal Development/Evolution Does Not Keep Pace with CST Timeline

Description: Portal development must keep pace with the demands of CST implementation. If the Portal is not ready for redesigned CST applications, their implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement and financial support may be required to keep the CST project on track.

Threat/Risk Title: OPM E-Business Timeline Does Not Keep Pace with CST Timeline

Description: The OPM e-business timeline may not keep pace with the requirements of CST implementation. If OPM is not ready for redesigned CST applications, new process implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement may be required to interface with OPM to keep the CST project on track.

5.4.9 Training Need and Potential Career Field Impact

Training may need to be modified to reflect new processing changes and/or to prepare individuals to use the process and capabilities. The changes within this process are expected to have moderate career field impact.

5.4.10 Metrics

The overarching objectives of Customer Service Transformation apply to all processes within this business area and are adequately measured using the following metrics:

- ◆ Customer satisfaction
- ◆ Self-service applications available via Portal and Contact Center
- ◆ Self-service transactions (as percent of total)
- ◆ Manpower savings

5.4.11 Benefits Analysis**5.4.11.1 Service Delivery Model**

Method	As-Is	To-Be
Front-Line Support	5%	5%
Contact Center	95%	75%
Portal	0%	20%
Total	100%	100%

Figure 5-66. Service Delivery Model

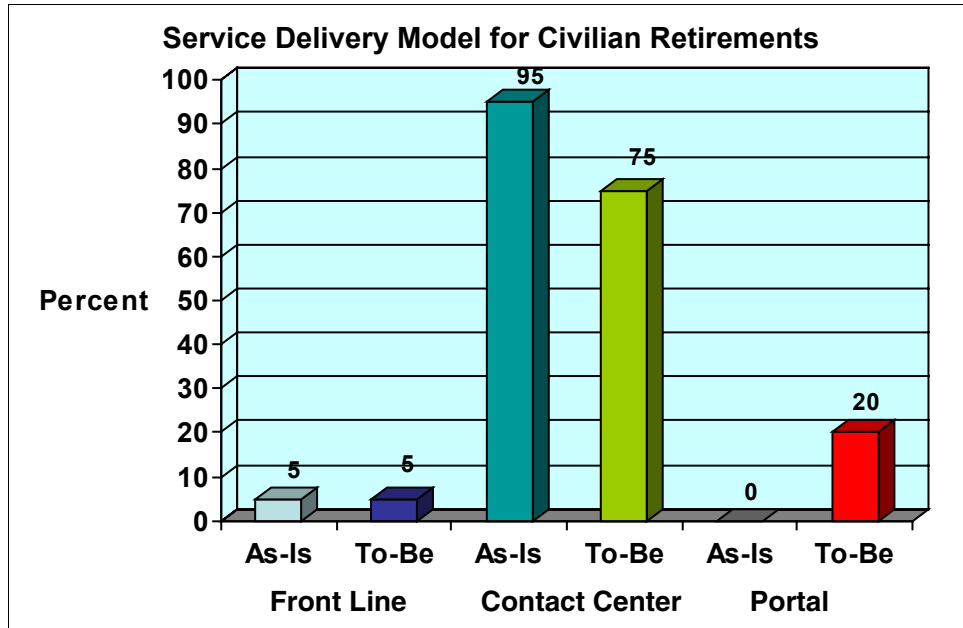


Figure 5-67. Service Delivery Model

Category	Units	To-Be
HR Workload Change	Time	Decreased by 20%
Customer Workload Change	Time	Decreased by 20%
Cycle Time Compression	Days	Decreased by 0% Process Decreased by 20% HR
Web Empowerment	Time	20%
Improve Effectiveness		Access time; increased functionality, accuracy, reliability, and morale

Figure 5-68. Lab Benefits Estimate

5.5 Processes Military Retirement

5.5.1 As-Is Process Narratives

5.5.1.1 Performs Preliminary Retirement Action (MPF)

Describes procedures involved in conducting retirement briefing, which includes member inquiry, pay estimations, application preparation/recommendations, briefing schedules, and updating projected retirement date.

5.5.1.2 Transfer to Retired Reserve (ARPC)

This section addresses steps involved in transferring to the retired reserve. Steps from receipt of AF Form 131, eligibility verification, approval/disapproval, update of MILPDS, certificates and flag request to distribution of orders.

5.5.1.3 Retired Pay Cases Age 60 (ARPC)

Procedures required with request age 60 pay roster. Identifies pay grade eligibility/determination and handles application submittal/approval, order requests, updates of the MILPDS/DFAS-CL system, certificates, flag requests, distribution of orders, and distribution of pay applications to DFAS-CL.

5.5.1.4 Retired Pay Cases AGR (ARPC)

Describes steps after receipt of AF Form 1160. Handles retirement approvals, pay/travel determinations, application reviews, order requests, updates of the MILPDS/DFAS-CL system, certificate/flag requests, distribution of orders, and distribution of pay applications to DFAS-CL.

5.5.1.5 Notification Retired Pay Age 60 (ARPC)

Identifies the eligibility and verification of age 60 retired pay. Involves receipt of official notification letters, MILPDS updates, and entitlements branch notifications.

5.5.1.6 Retirement (CSS, MPF, AFPC, and Reserve Unit)

Describes the procedures and activities involved upon member's submittal of AF Form 1160. Identifies steps after approval, including waivers, medical holds, and retirement eligibility, out-processing checklist/documents, receipt of retirement orders, disposition of the personnel information file, copies to appropriate agencies, and filing of documents in retirement folder.

5.5.1.7 FM Processes for Military Retirement (Active)

Receives Joint Uniform Military Pay System (JUMPS) Transaction Register (JTR) or orders from Military Personnel Flight (MPF) and reviews JTR for E5 (separation) transaction: Establishes separation working file (SWF). Files all pay affecting documentation (including retirement orders), received from date of notification of separation in SWF, starts action to resolve any suspense items, and inputs any delinquent or required transactions. Verify that terminal leave is posted. Verify that all recent Financial Services Office (FSO) submitted transactions are posted. Transactions must be posted to the Master Military Pay Account (MMPA) by 10 days before DOS to be included in the PQ61. Maintains SWF until record is in V (final separation) status. If member is not in T-status, process ST04 and send Electronic Case Control System message (ECCS) to DFAS-DE.

Reviews management case files for pending debts or dependency determination: Takes action to collect all debts by DOS and when necessary, checks status of dependency determination.

Schedules briefing appointment for member: Ideally the briefing is scheduled NLT 30 days prior to DOS. Refers member to MPF if E5 transaction is not posted.

Conducts briefing to inform member of the following: The process for filing of final travel voucher, when allotments will stop paying and what allotments can carry over to retired pay, DFAS-DE will re-compute his or her pay account at DOS plus 20 days and if the re-computation shows the member was underpaid, DFAS-DE mails the additional payment to the address furnished in the E5 transaction; if re-computation shows indebtedness, DFAS-DE takes collection action. Advise members that if a financial organization or allotment recipient fails to return a payment or allotment, a debt for that amount will result. FSO is required to explain the final active duty payment to the member. Includes what entitlements will/will not be paid and any leave sell due the member.

Reviews and signs out-processing checklist and assists in completing documents: Signs member's MPF checklist and assists in allotment, direct deposit, tax changes, etc.

Reviews documents for accuracy and completeness and codes document for input: All pay documents must be coded with the proper Defense Joint Military Pay System (DJMS) format ID and action code.

Reviews travel record for outstanding orders and advances: Ensures member has no outstanding travel vouchers that must be settled.

Pulls and reviews folder prior to retirement date: Final review to ensure everything needed to compute the payment is in the folder.

Reviews record for payment authorization: Reviews pay record to ensure everything has processed properly on the record and that DFAS has authorized a payment (10 days prior to retirement date). Contacts DFAS if no payment authorization is on the record.

Pulls DJMS print, LES and other data available at base to calculate amount due at separation if no PQ61 is received from DFAS-DE: Use AF Form 350, Separation Pay Worksheet, through authorized date. Decreases amount due for questionable items. Use the computer transaction code JPBB to make the payment and process the PQ03 (payment transaction) for the amount paid.

Prepares payment document, Defense Finance and Accounting Service-Denver, (DFAS-DE) Form 2424, Electronic Funds Transfer Payment Request/Authorization, and sends copy of form to Quality Assurance.

Codes document for input: Sends to customer support for processing.

Sends payment message to DFAS-DE if the NT (memo) payment line on the member's record is different from the payment: This lets DFAS know that the FSO computation does not match the DFAS computation.

Annotates folder and files: File should be maintained until DFAS generates a base level separation payment report (4-5 months).

Follows-up member's DJMS retirement status: To ensure retired pay account gets set up at DFAS-Cleveland.

Reviews final travel documentation: Member has 1 year to file the voucher. Separation file is not needed to settle the travel voucher.

Forwards voucher to Customer Support for processing: FSO internal move of the voucher from the Customer Service area to Customer Support for processing into the travel system.

5.5.1.8 FM Processes for Military Retirement (ANG)

Receives Joint Uniform Military Pay System (JUMPS) Transaction Register (JTR) or orders from Military Personnel Flight (MPF) and processes E5 (separation) transaction: Then sends copies of all pertinent documentation (AGR separation order, retirement order, terminal leave and PTDY leave slips) to the Active Duty Host. Active duty host establishes separation working file (SWF). Files all pay affecting documentation (including retirement orders), received from date of notification of separation in SWF, starts action to resolve any suspense items, and inputs any delinquent or required transactions. Verify that terminal leave is posted. Verify that all recent Financial Services Office (FSO) submitted transactions are posted. Transactions must be posted to the Master Military Pay Account (MMPA) by 10 days before DOS to be included in the PQ61. Maintains SWF until record is in V (final separation) status. If member is not in T-status, process ST04 and send Electronic Case Control System message (ECCS) to DFAS-DE.

Exception: Traditional Guard process. For members paid through RC system, DP processes separation transaction that converts to a 900 TIN in DJMS RC. FM has no part in this process.

Host FSO reviews management case files for pending debts or dependency determination: Takes action to collect all debts by DOS and when necessary, checks status of dependency determination.

Exception: Traditional Guard process. Check MMPA for outstanding debts and increases collection rate if applicable. Check local database for any outstanding orders in suspense, contacts squadron to determine if duty was performed or if order needs to be revoked.

Host FSO schedules briefing appointment for member: Ideally the briefing is scheduled NLT 30 days prior to DOS.

Exception: Traditional Guard process. MPF handles briefings. FM is on the out-processing checklist to verify Government Travel Card has been turned in and all documents to complete outstanding payments are received prior to departure.

Host FSO conducts briefing to inform member of the following: The process for filing of final travel voucher, when allotments will stop paying and what allotments can carry over to retired pay, DFAS-DE will re-compute his or her pay account at DOS plus 20 days and if the re-computation shows the member was underpaid, DFAS-DE mails the additional payment to the address furnished in the E5 transaction; if re-computation shows indebtedness, DFAS-DE takes collection action. Advise members that if a financial organization or allotment recipient fails to return a payment or allotment, a debt for that amount will result.

Exception: Traditional Guard process. Not required for traditional members.

Host FSO is required to explain the final active duty payment to the member: Includes what entitlements will/will not be paid and any leave sell due the member.

Exception: Traditional Guard process. Not required for traditional members.

Host FSO reviews and signs out-processing checklist and assists in completing documents: Signs member's MPF checklist and assists in allotment, direct deposit, tax changes, etc.

Exception: Traditional Guard process. Not required for traditional members.

Host FSO reviews documents for accuracy and completeness and codes document for input: All pay documents must be coded with the proper Defense Joint Military Pay System (DJMS) format ID and action code.

Exception: Traditional Guard process. Not required for traditional members.

Unit FM reviews travel record for outstanding orders and advances: Ensures member has no outstanding travel vouchers that must be settled. Same for AGR members and Traditional members.

Host FSO pulls and reviews folder prior to retirement date: Final review to ensure everything needed to compute the payment is in the folder.

Exception: Traditional Guard process. Not required for traditional members.

Host FSO reviews record for payment authorization: Reviews pay record to ensure everything has processed properly on the record and that DFAS has authorized a payment (10 days prior to retirement date). Contacts DFAS if no payment authorization is on the record.

Exception: Traditional Guard process. Not required for traditional members.

Host FSO pulls DJMS print, LES and other data available at base to calculate amount due at separation if no PQ61 is received from DFAS-DE: Use AF Form 350, Separation Pay Worksheet, through authorized date. Decreases amount due for questionable items. Use the computer transaction code JPBB to make the payment and process the PQ03 (payment transaction) for the amount paid.

Exception: Traditional Guard process. Not required for traditional members.

Host FSO prepares payment document, Defense Finance and Accounting Service-Denver, (DFAS-DE) Form 2424, Electronic Funds Transfer Payment Request/Authorization, and sends copy of form to Quality Assurance.

Exception: Traditional Guard process. Not required for traditional members.

Host FSO sends payment message to DFAS-DE if the NT (memo) payment line on the member's record is different from the payment: This lets DFAS know that the FSO computation does not match the DFAS computation.

Exception: Traditional Guard process. Not required for traditional members.

Host FSO annotates folder and files: File should be maintained until DFAS generates a base level separation payment report (4-5 months).

Exception: Traditional Guard process. Not required for traditional members.

Host FSO follows-up member's DJMS retirement status: To ensure retired pay account gets set up at DFAS-Cleveland.

Exception: Traditional Guard process. Not required for traditional members.

Host FSO reviews final travel documentation: Member has 1 year to file the voucher. Separation file is not needed to settle the travel voucher.

Exception: Traditional Guard process. Not required for traditional members.

Host FSO forwards voucher internally to Customer Support for processing: FSO internal move of the voucher from the Customer Service area to Customer Support for processing into the travel system.

Exception: Traditional Guard process. Not required for traditional members.

Additional Actions by "ANG Unit": Follow Up Procedures. AGR members: (AC) Review MMPA to ensure Active Duty Host made final payment, if not, enter case into CMS and route to host for action. Traditional Guard Members: (RC) Review MMPA to ensure 900 flowed from MilPDS, if not, set up CMS case and route to local DP for action.

5.5.1.9 FM Processes for Military Retirement (Reserve)

Out-processing checklist is generated in the MPF. FSO/RPO briefs member on: Reserve Pay entitlements, Government Travel Card (GTC), MyPay for obtaining W2, keeping bank account open until all pay has been received.

RPO receives a copy of the order: May also receive a copy of MPF letter on SGLI Benefits with the member's signature to ensure member is briefed on SGLI entitlements. This documentation is put in suspense.

Reviews RPO reconciliation report: UH-022-0250, DJMS-RC Non-Performing Members. Works with the MPF to ensure member is separated. Loss transaction is input by MPF.

RPO verifies that the MMPA updates with Date of Separation (DOS). RPO continue to process transactions for duty prior to DOS.

MMPA drops from DJMS-RC after one year: After the MMPA is no longer active, pay transactions must be processed manually on MPO (DD114) and sent to DFAS.

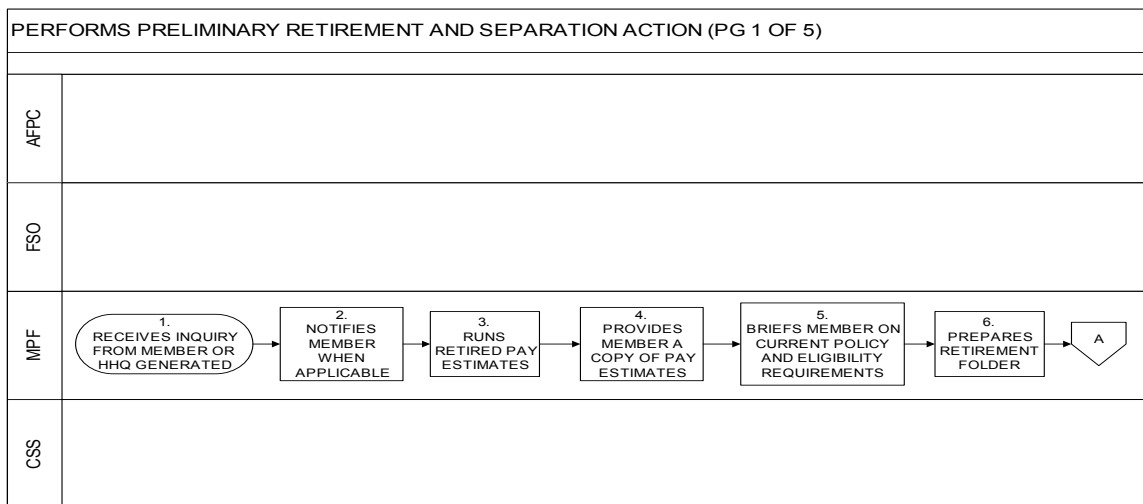


Figure 5-69. As-Is Flowchart (page 1 of 5)

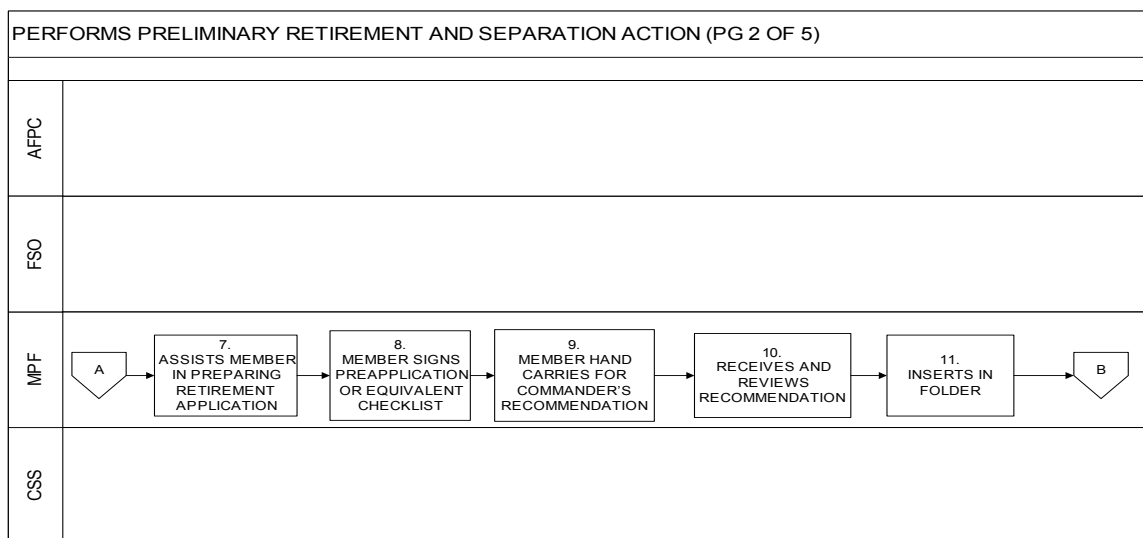


Figure 5-70. As-Is Flowchart (page 2 of 5)

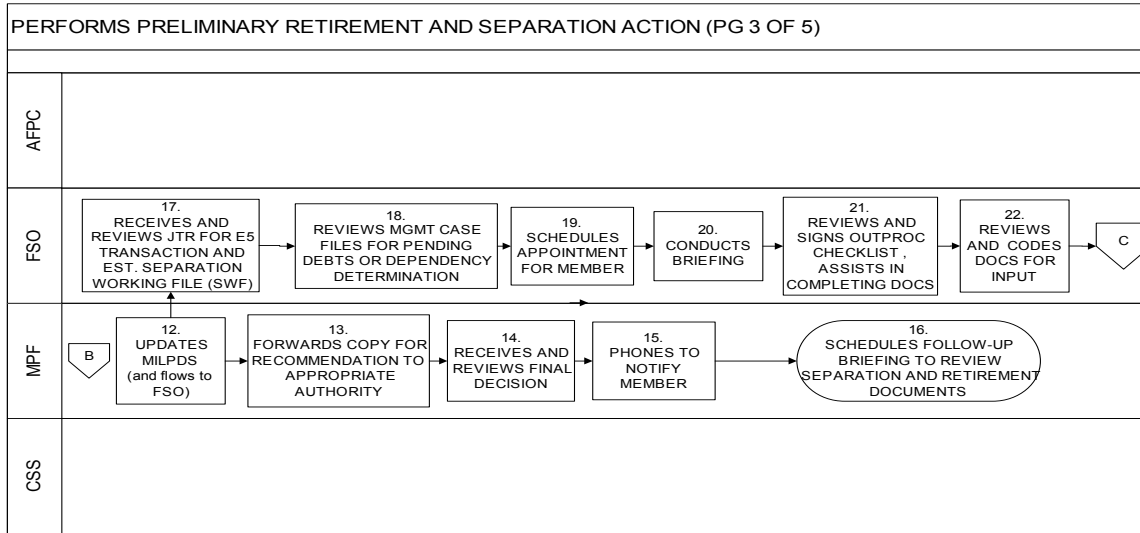


Figure 5-71. As-Is Flowchart (page 3 of 5)

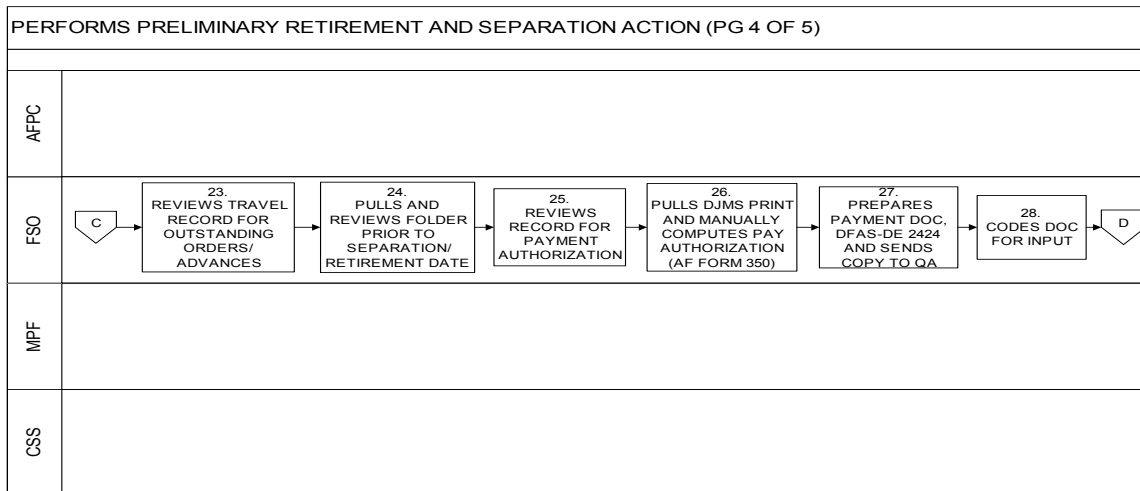


Figure 5-72. As-Is Flowchart (page 4 of 5)

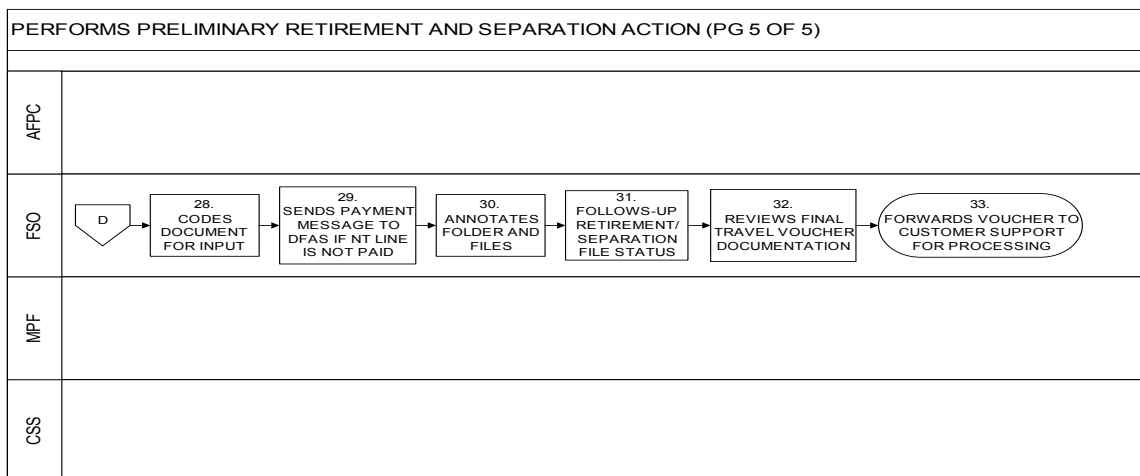


Figure 5-73. As-Is Flowchart (page 5 of 5)

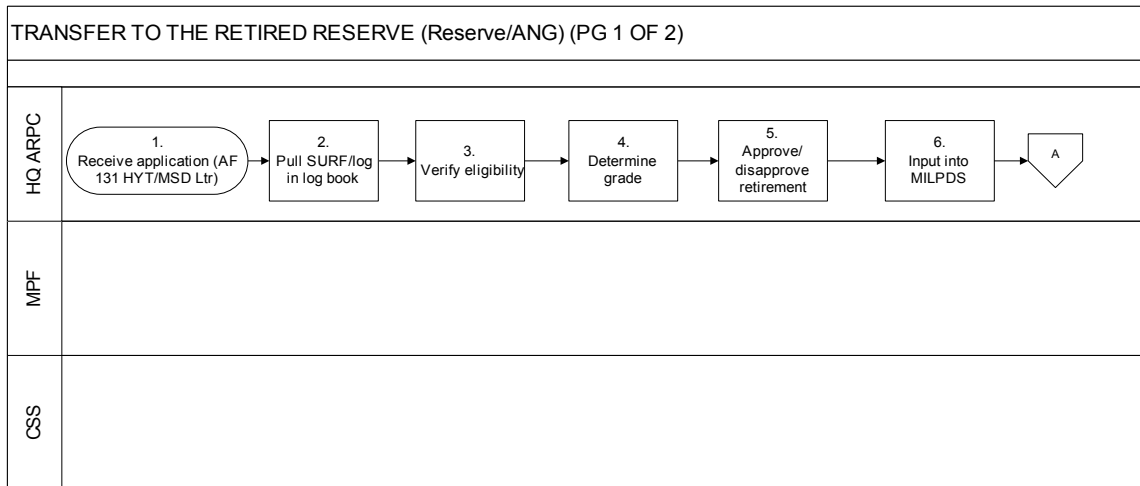


Figure 5-74. As-Is Flowchart (page 1 of 2)

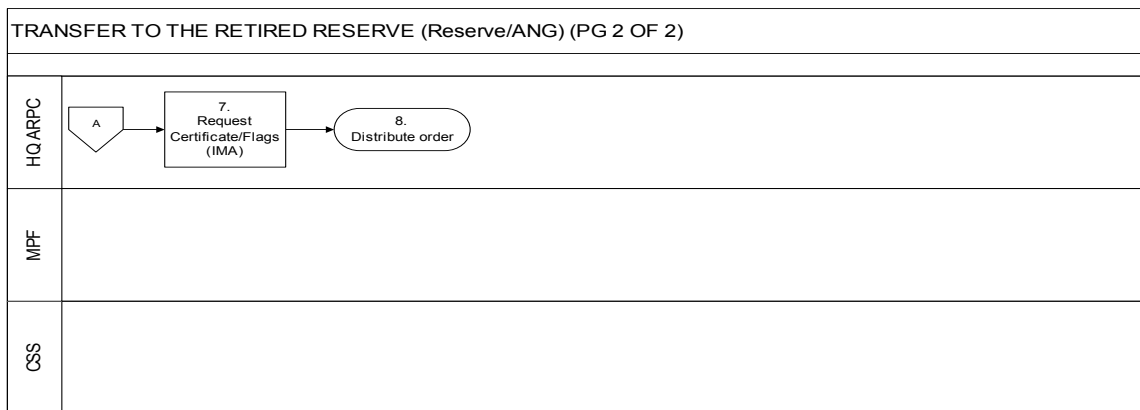


Figure 5-75. As-Is Flowchart (page 2 of 2)

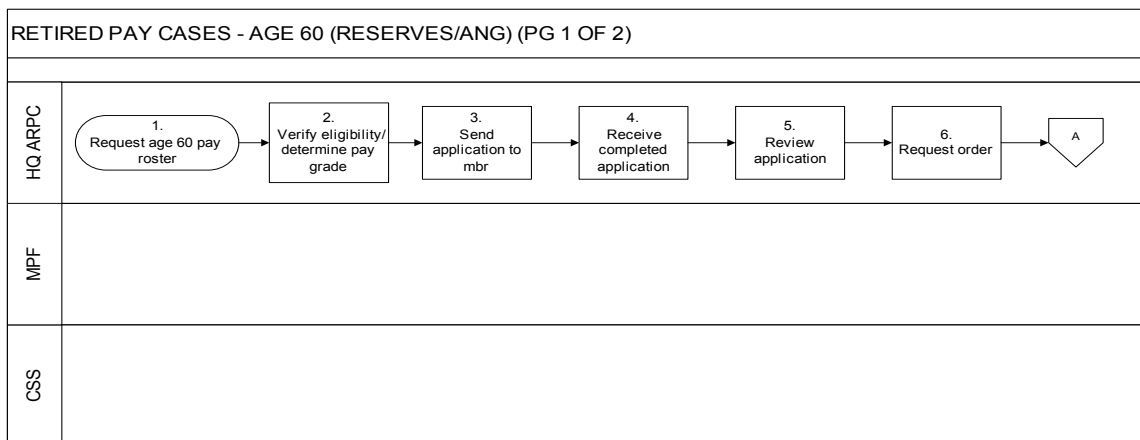


Figure 5-76. As-Is Flowchart (page 1 of 2)

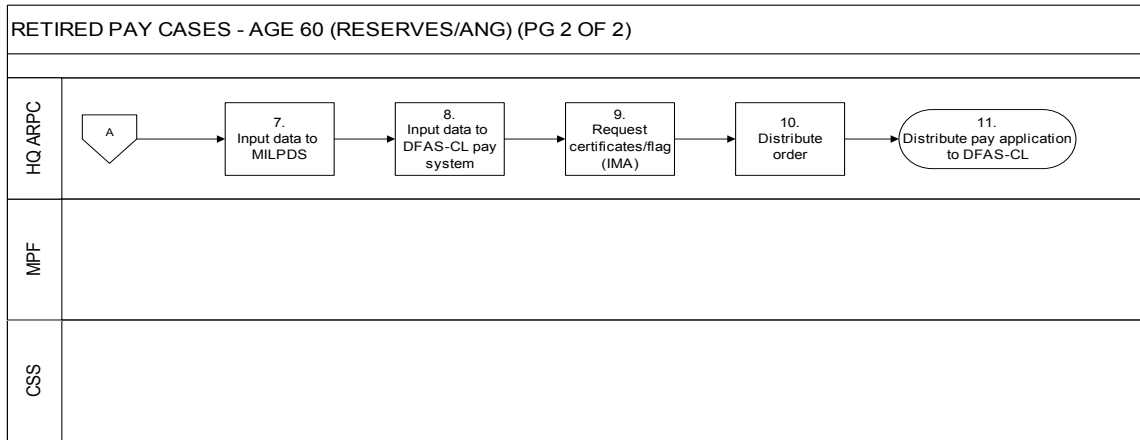


Figure 5-77. As-Is Flowchart (page 2 of 2)

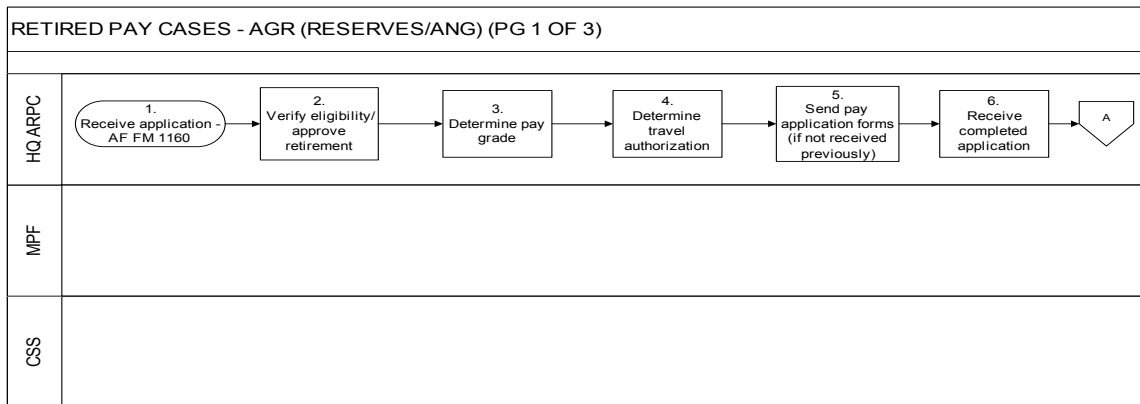


Figure 5-78. As-Is Flowchart (page 1 of 3)

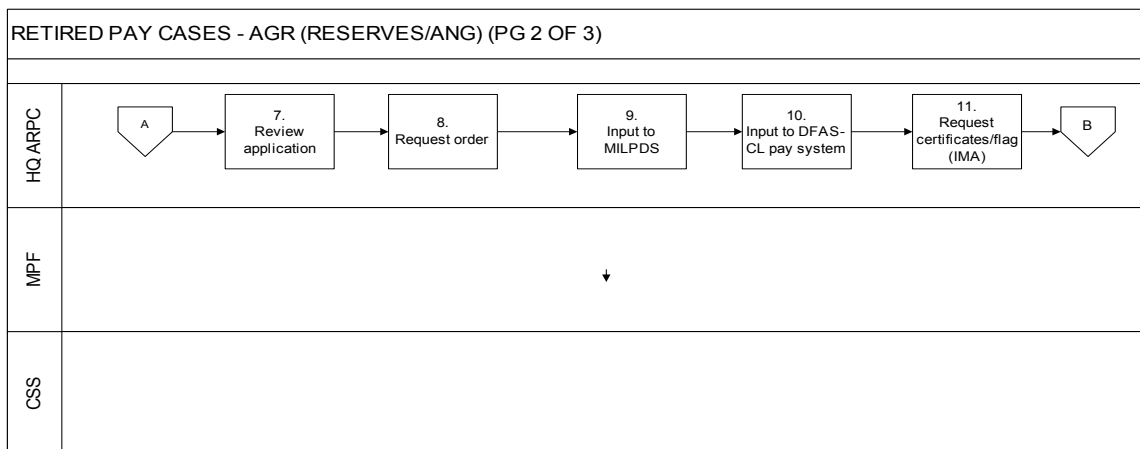


Figure 5-79. As-Is Flowchart (page 2 of 3)

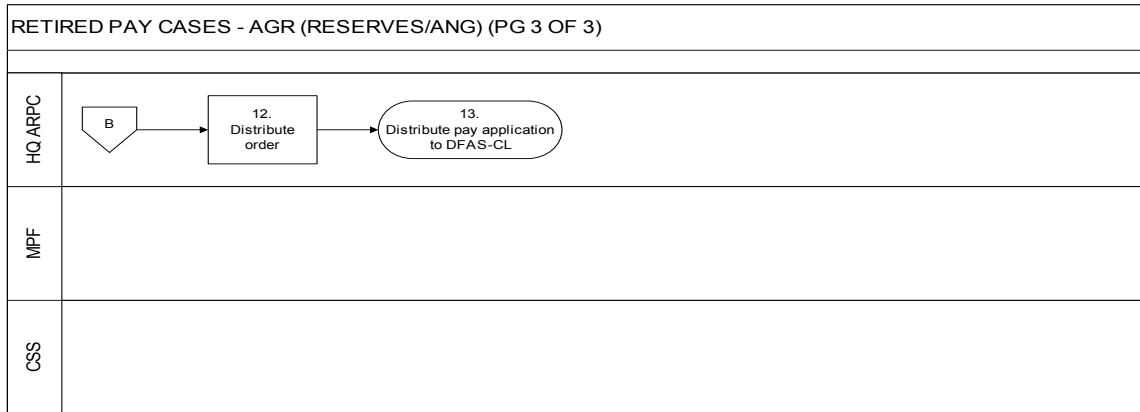


Figure 5-80. As-Is Flowchart (page 3 of 3)

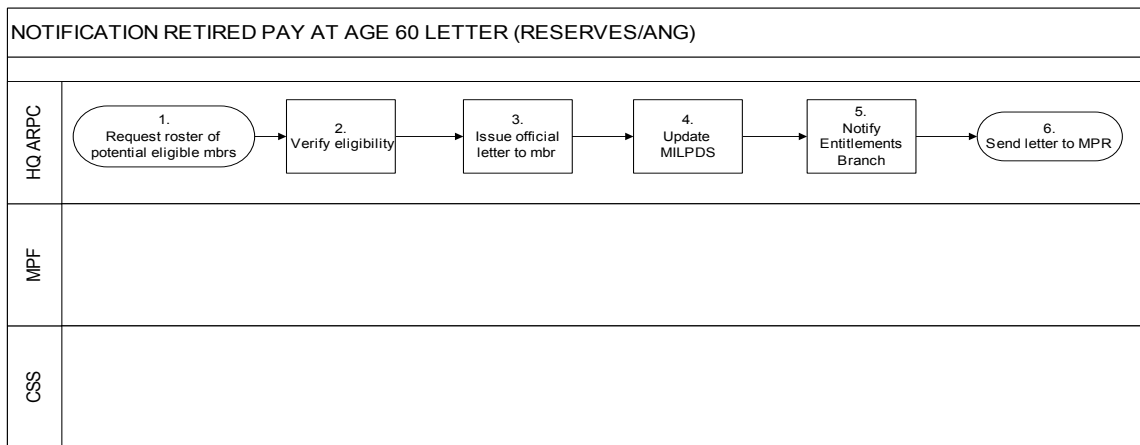


Figure 5-81. As-Is Flowchart

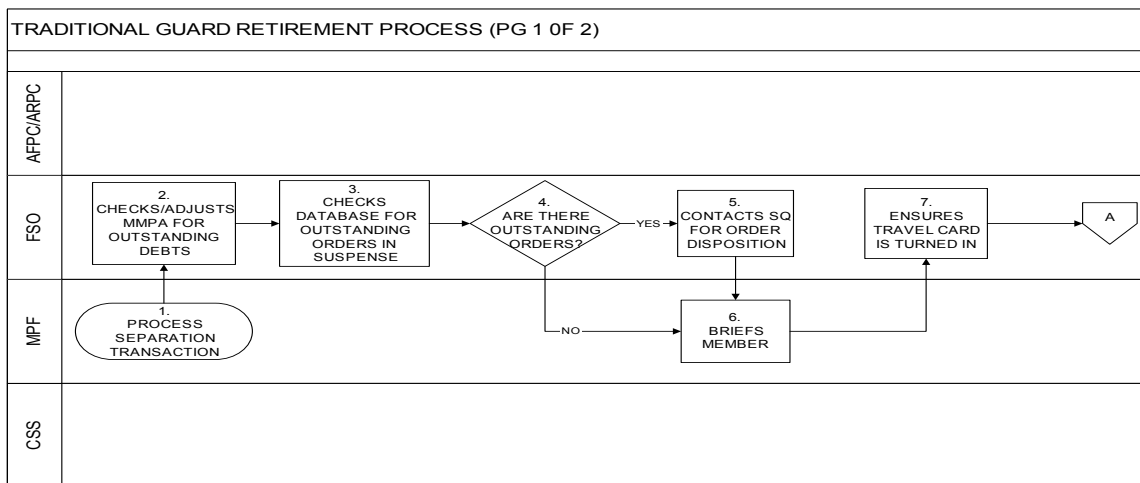


Figure 5-82. As-Is Flowchart (page 1 of 2)

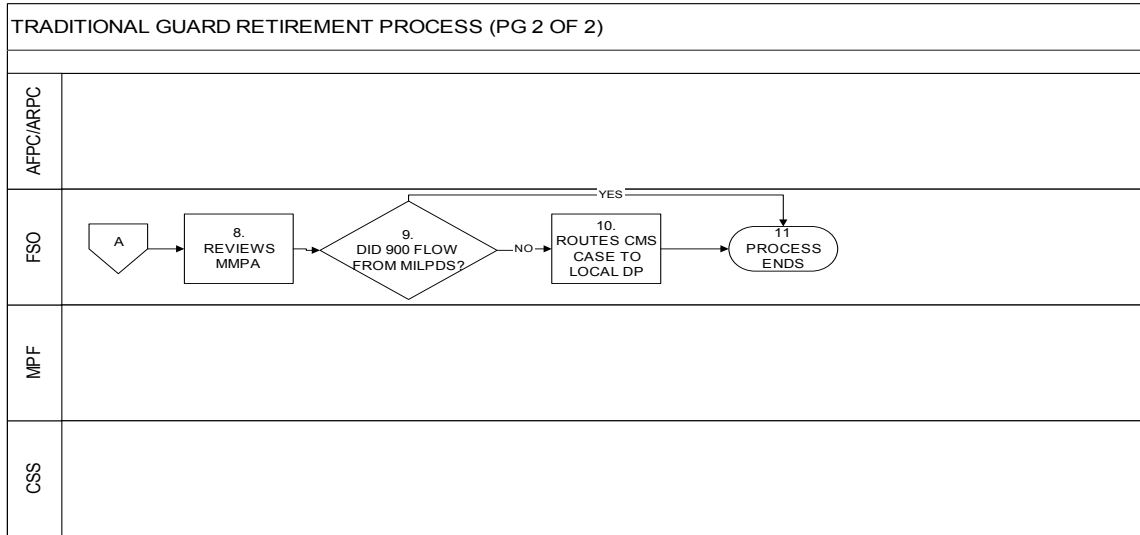


Figure 5-83. As-Is Flowchart (page 2 of 2)

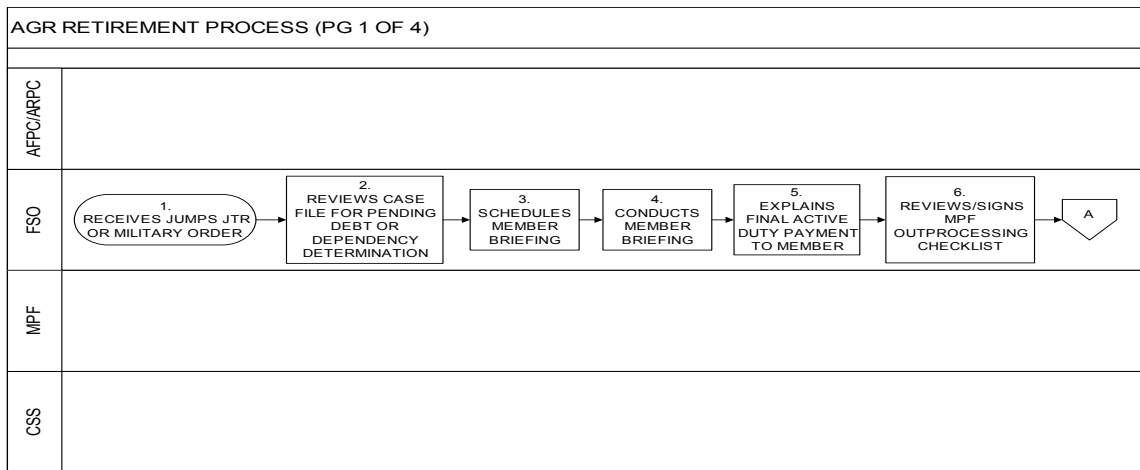


Figure 5-84. As-Is Flowchart (page 1 of 4)

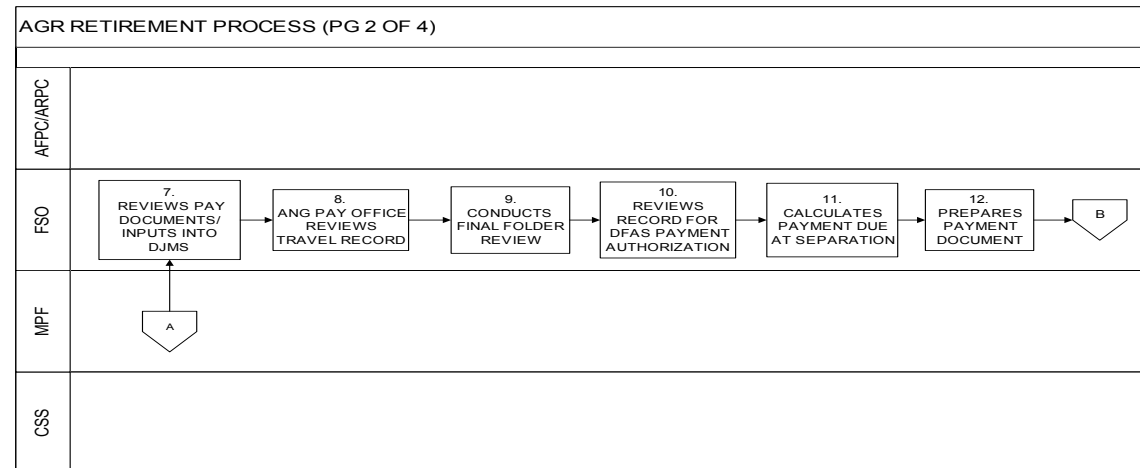


Figure 5-85. As-Is Flowchart (page 2 of 4)

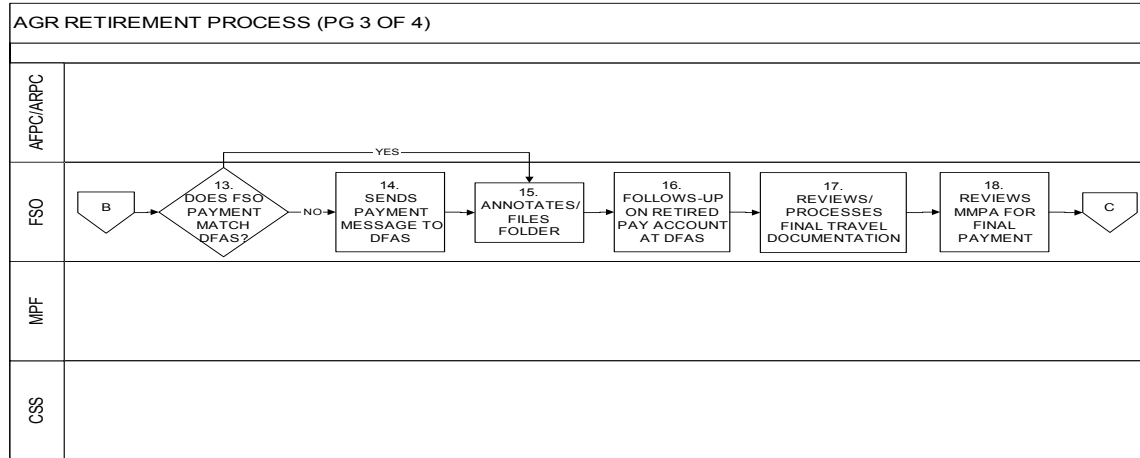


Figure 5-86. As-Is Flowchart (page 3 of 4)

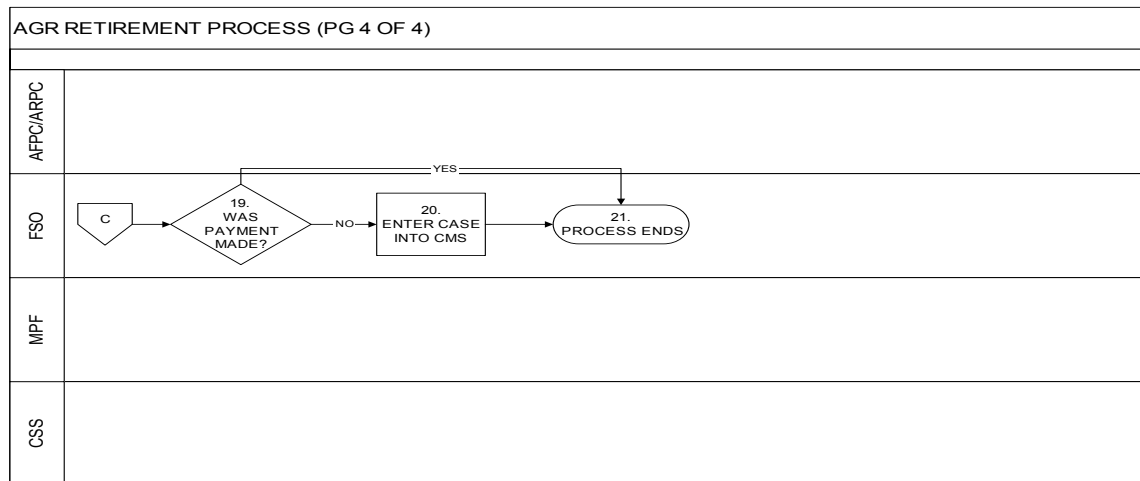


Figure 5-87. As-Is Flowchart (page 4 of 4)

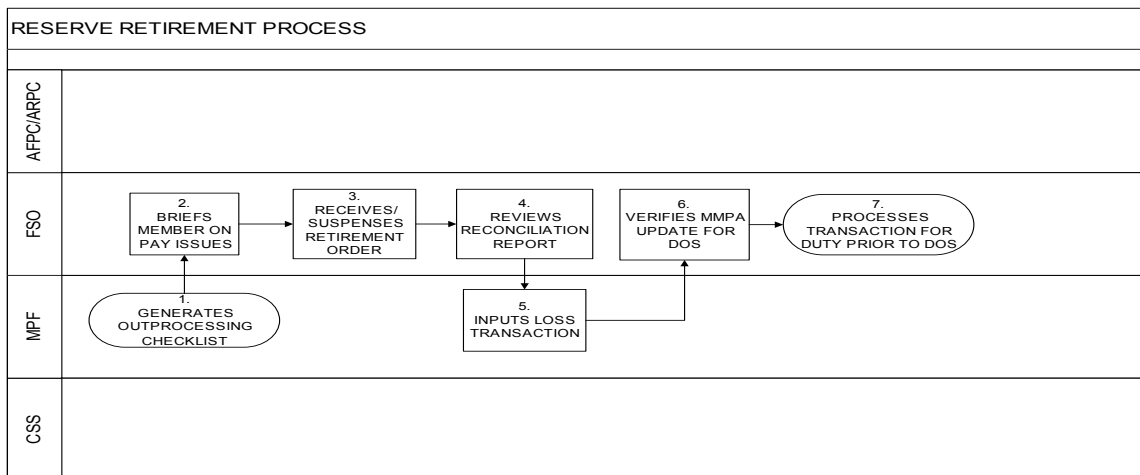


Figure 5-88. As-Is Flowchart

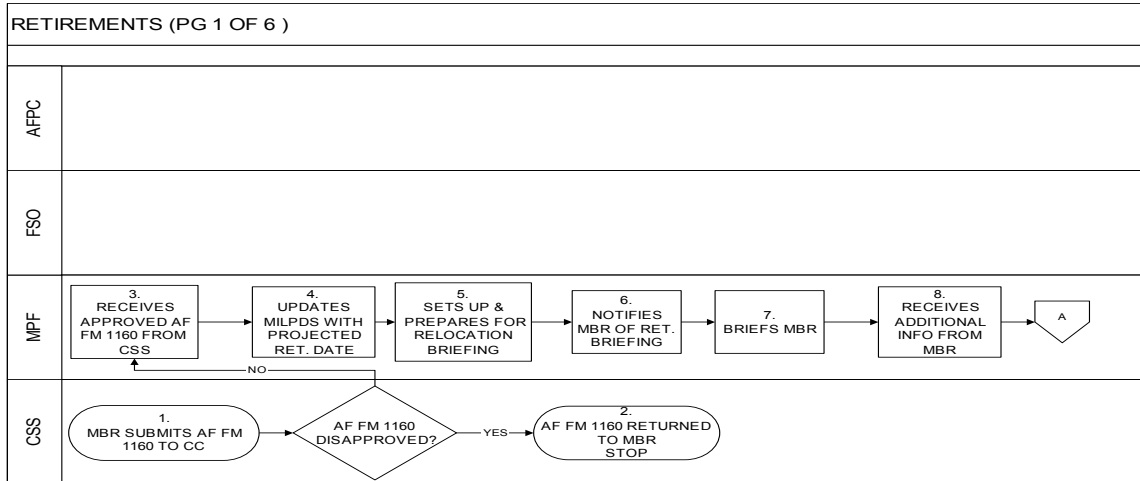


Figure 5-89. As-Is Flowchart (page 1 of 6)

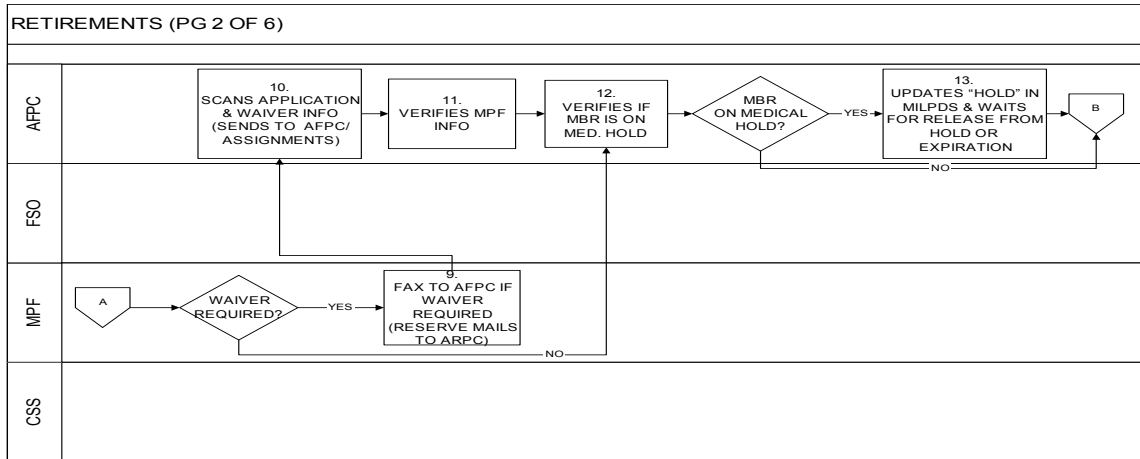


Figure 5-90. As-Is Flowchart (page 2 of 6)

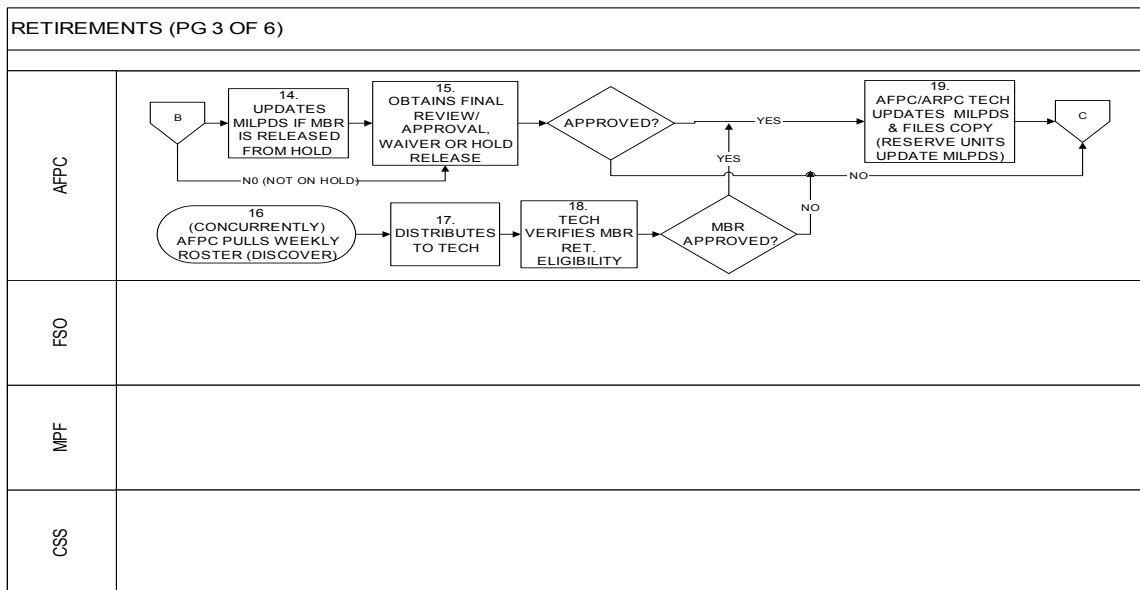


Figure 5-91. As-Is Flowchart (page 3 of 6)

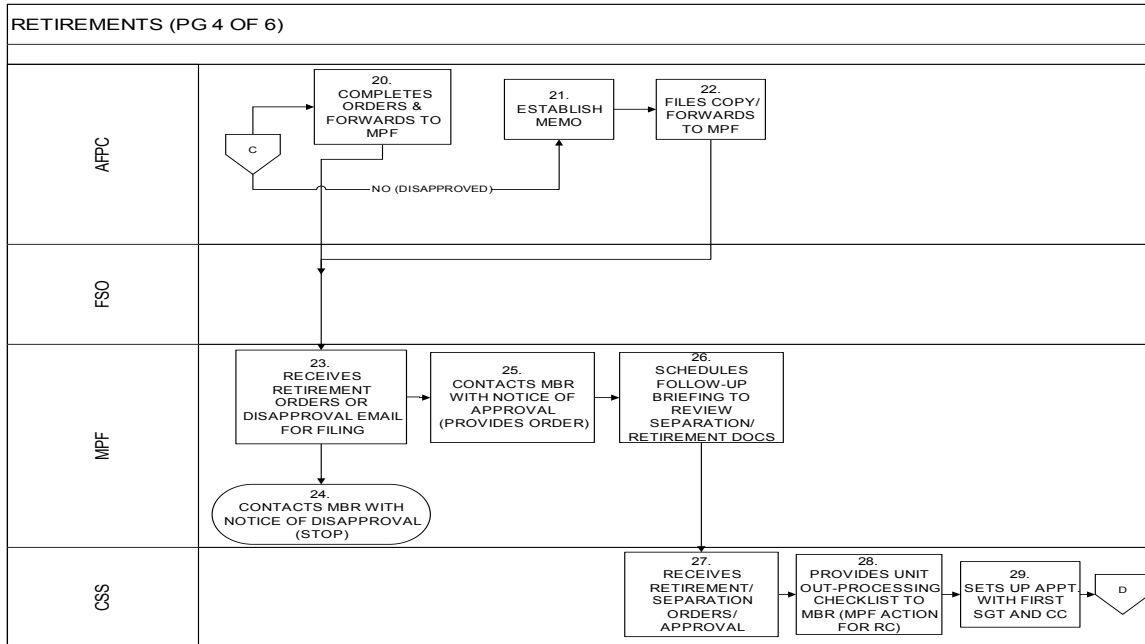


Figure 5-92. As-Is Flowchart (page 4 of 6)

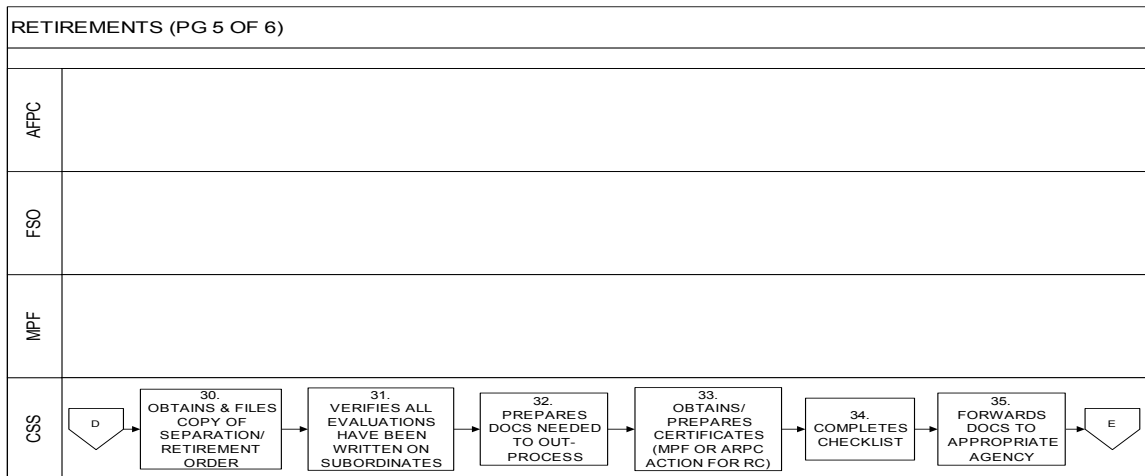


Figure 5-93. As-Is Flowchart (page 5 of 6)

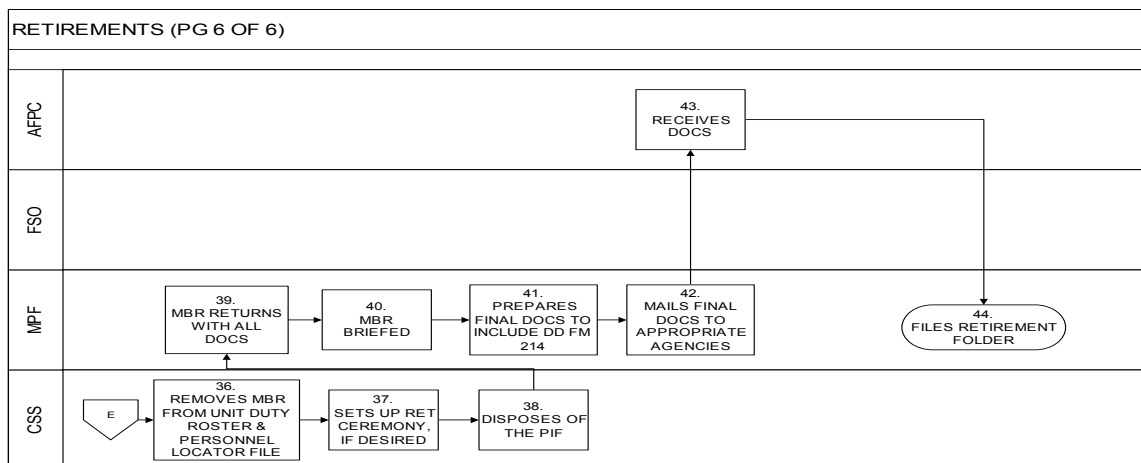
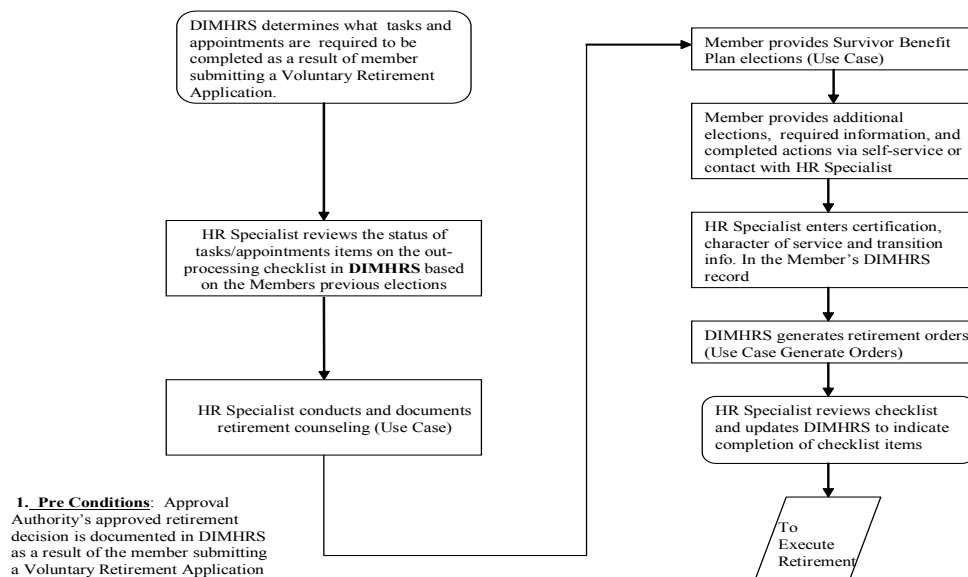


Figure 5-94. As-Is Flowchart (page 6 of 6)

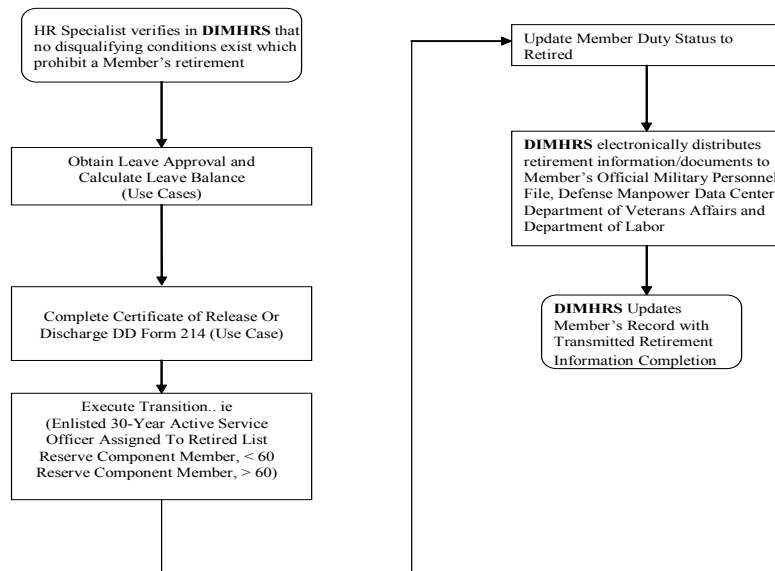
¹ Process Approved Retirement Action (DIMHRS)



EXCEPTION FLOW 1: Process may end at any point if member obtains authority to withdraw an approved retirement application.

EXCEPTION FLOW 2: Process may end at any point if the HR Specialist is notified or determines a disqualifying condition exists

Figure 5-95. DIMHRS Process Flowchart (page 1 of 2)

Execute Retirement (DIMHRS)**Figure 5-96. DIMHRS Process Flowchart (page 2 of 2)**

As-Is Level of Effort for Processes Military Retirement	
Cycle Time	180 days
HR Process Time	621 minutes
Count and Frequency	29,376 annually

Figure 5-97. As-Is Level of Effort**5.5.2 To-Be Process Narrative**

The To-Be process may be initiated by the member or higher headquarters. If a directed or mandatory retirement (disciplinary action, high year of tenure, etc.), the higher headquarters notifies the commander to counsel/notify the member of his or her need to retire. If a voluntary retirement, the system notifies the member of his or her eligibility under the applicable program and provides the necessary application links. Application help links are available and personal information is prepopulated as applicable. If the member is from the Guard or Reserve component, he or she also applies for transfer to the Retired Reserve at this time. The system will only request information required for the retirement program for which the member is applying. For instance, the same set of information is not requested from persons retiring from the active and reserve component or in early separation programs.

If the member has restrictions against retiring that may be waived, the member completes the waiver as part of the application. If supporting documentation is required, such as letters and statements, the member will scan the documents into the system for electronic storage. Links to supporting documentation and the application are forwarded to the member's commander or program manager (Reserves) for recommendation. The electronic retirement package is forwarded to the appropriate approval agency, currently the Secretary of the Air Force or a designee. The designated OPR may manually route packages for coordination, if necessary.

If the retirement/waiver application is disapproved, the Contact Center enters the disapproval and reason into the human resource management system (HRMS) and notifies the member and others, as appropriate. If the retirement/waiver application is approved, the Contact Center

updates HRMS, sends projected retirement information to the Defense Finance and Accounting Service (DFAS), and notifies the member and others, as appropriate. The approved retirement order is archived in the content management system for use by the member and other functions during the retirement process. The member completes the retirement briefing online and receives an electronic checklist of the steps required to retire.

When feasible, the Contact Center sends electronic notifications to the various base agencies to facilitate out-processing actions. All members (Guard, Reserve, and active) receive a Survivor Benefit Plan (SBP) briefing, preferably face-to-face. If possible, the spouse attends the briefing. The Contact Center may provide SBP counseling and a video briefing may be provided online. According to current guidance, if the member elects less than the standard level of SBP, the spouse's concurrence must be documented.

The member previews the Department of Defense Form 214 (DD Fm 214), Certificate of Release or Discharge from Active Duty, and any other retirement documents for completeness and accuracy. Note that the reserve component may have unique documentation requirements such as the NGB 22, Report of Separation and Record of Service. The member also makes his or her election for federal income tax withholding and verifies/updates pay account information and other pension/accounting data. If using a combined personnel and pay system, the information is updated within the system; otherwise, the required transactions or documents are forwarded to the Defense Finance and Accounting Service (DFAS).

If the member is from the Guard or Reserve component, the Contact Center enters a pending transaction into the pay system (DFAS or combined personnel/pay system, whichever is in use at the time of retirement) that will send a pay package to the retiree prior to age 60. This package may be sent via mail or if available, electronic means. The package requests that the member update tax, beneficiary, financial institution, SBP, and other related data. The Contact Center receives and processes this package, producing orders and documentation, updating the HRMS, and sending notifications as appropriate. Final documentation is provided to the member. Retirement pay starts at age 60.

The member completes required unit-level out processing and the unit verifies that required out processing for the unit and the base has been accomplished. The member also completes associated terminal leave/permissive TDY forms in the system. After verification of completed out processing, the member e-signs the DD Fm 214 and any other retirement documents required. All retirement documents are forwarded to the Contact Center for computation of unused leave, pay, and allowances. The Contact Center also conducts quality reviews of retirement documents and returns them for correction if required.

The member may submit a final travel voucher and returning overseas personnel conduct final separation actions using the Air Force Portal at his or her final destination. This requires a change in current policy, which requires members to separate at a military installation.

If the member has a retirement ceremony, the unit obtains the appropriate certificates, flag, and other memorabilia. If the retiring member is not attached to a unit (e.g., as an individual mobilization augmentee [IMA]), the Contact Center obtains the appropriate certificates, flag, and other memorabilia.

After the retirement ceremony (or if there is none), the Contact Center electronically signs all documents, including the DD Fm 214; archives the documents; and scans any documents not available in electronic form into the member's virtual record. The Contact Center distributes the documents as required and notifies the member and others as appropriate of final actions. The

system will generate suspenses for DFAS notification of grade advancement, if applicable. DFAS conducts final/retired pay actions.

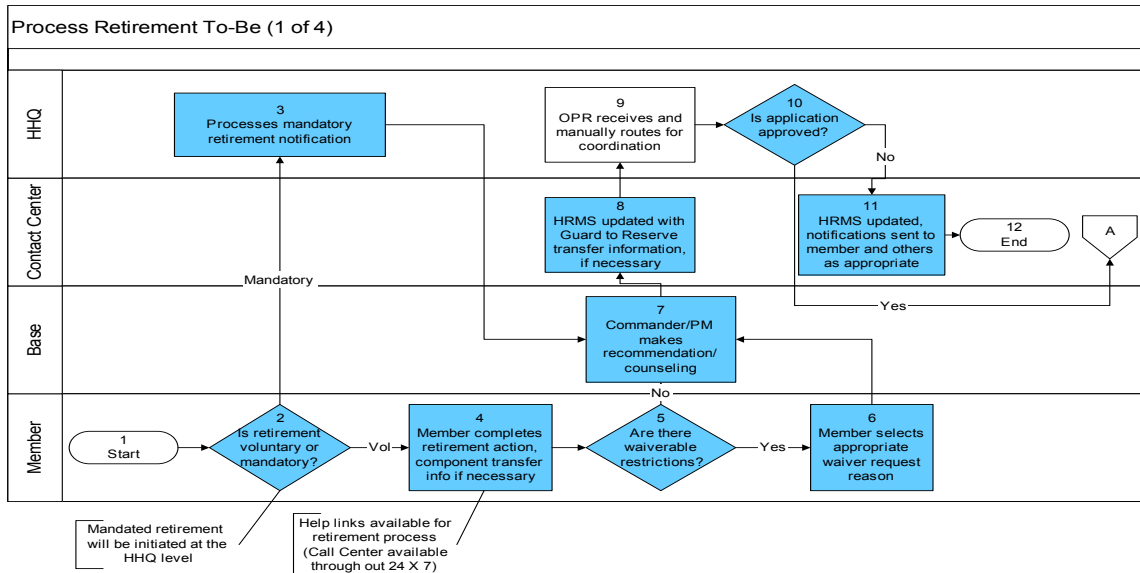


Figure 5-98. To-Be Process Flowchart (page 1 of 4)

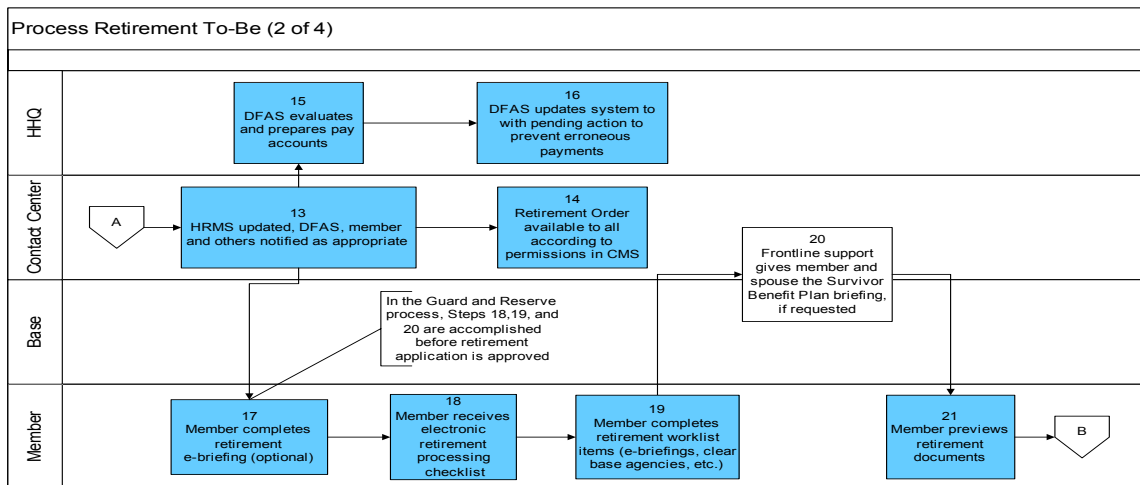


Figure 5-99. To-Be Process Flowchart (page 2 of 4)

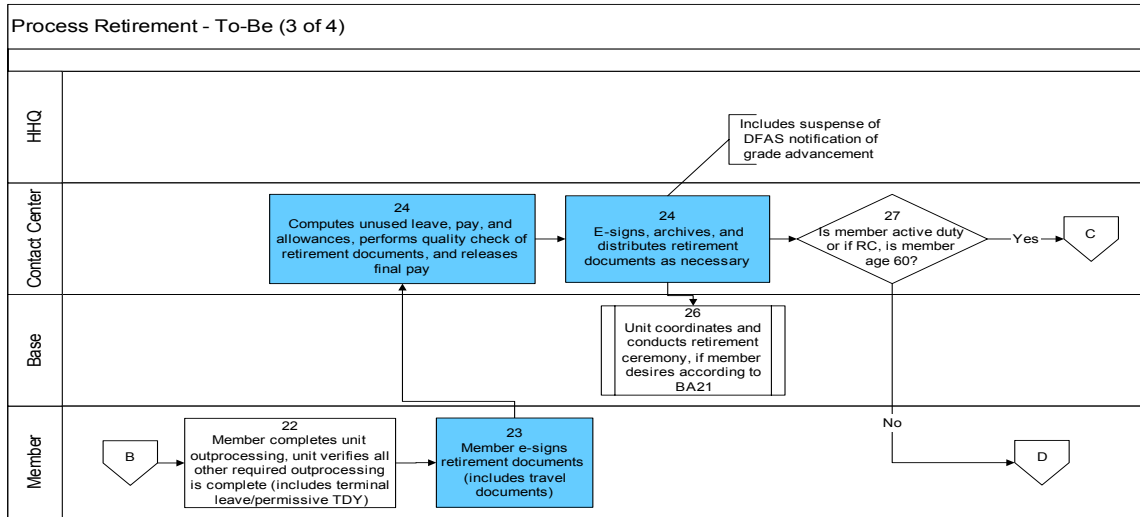


Figure 5-100. To-Be Process Flowchart (page 3 of 4)

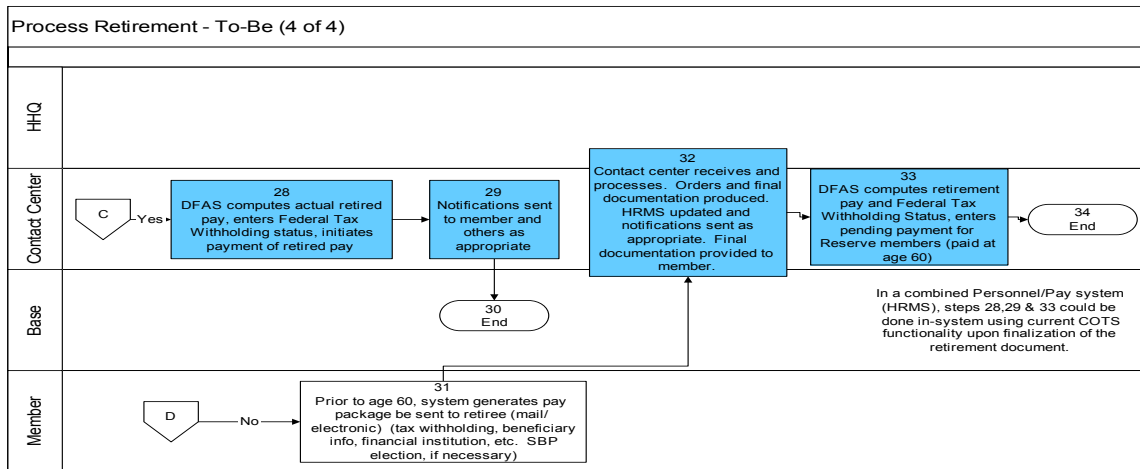


Figure 5-101. To-Be Process Flowchart (page 4 of 4)

Comparison of As-Is and To-Be for Processes Military Retirements				
Cycle Time Compression	Process Time		Compression Factor	Change
	HR Time		1	0%
Cycle Time Reduction	As-Is		To-Be	Change
	Days	180	180	Decreased by 0 days
Average Process Time	Time	621 minutes	130 minutes	-491 minutes
	Count	29,376	29,376	No change
Frequency	Annual		Annual	No change

Figure 5-102. Comparison of As-Is and To-Be

5.5.3 System Fit-Gap Analysis

To-Be Process Flow	Initiate	Create	Coord	Certify	Update	Archive	Produce Document
MILPDS	N	N	N	N	Y	N	N
DIMHRS	N	Y	Y	Y	Y	N	Y
PeopleSoft	N	M	Y	N	Y	N	M
Oracle	N	M	Y	N	Y	Y	M
CMS	N	Y	Y	Y	N	Y	Y

C = Customization of COTS software recommended

N = Not available

M = Modification of COTS software recommended

Y = Available in software

Figure 5-103. System Fit-Gap Analysis

5.5.4 Data Element Fit-Gap Analysis

See Annexes B and C for list of data items.

5.5.5 Strategy and Phasing

Total Force	Short-Term	Mid-Term	Long-Term
Military	CMS	DIMHRS	DIMHRS Plus

Figure 5-104. Strategy and Phasing

5.5.6 Compliance Matrix

Reference Name	Reference Title	Affected by Changed Process
AFI 36-2102	Base-Level Relocation Procedures	Yes
AFI 36-2110	Assignments	Yes
AFI 36-2606	Reenlistments in the USAF	Yes
AFRCI 36-201	Air Reserve Technician (ART) Officer—Extension to Mandatory Separation Date	Yes
ANGI 36-2101	The Active Guard/Reserve (AGR) Program	Yes
ANGI 36-3201	Air National Guard Separations Documents	Yes
AFCSM 36-699, Vol. 1	Personnel Data Systems	Yes
ARPCI 36-3203	Computation of USAFR Retired Pay	Yes
ARPCM 36-2603	Air Force Reserve Enlisted Incentives	Yes
DFAS DEM 7073-1/3	Defense Joint Military Pay System-AC/RC	Yes
AFI 36-3203	Service Retirements	Yes
AFI 36-3204	Procedures for Applying as a Conscientious Objector	Yes
AFI 36-3205	Applying for the Palace Chase and Palace Front Programs	No
AFI 36-3207	Separating Commissioned Officers	No
AFI 36-3208	Administrative Separation of Airmen	No
AFI 36-3209	Separation and Retirement Procedures for Air National Guard and Air Force Reserve Members	Yes
AFI 36-3212	Physical Evaluation for Retention, Retirement, and Separation	Yes
DoDFMR Vol. 7A	Military Pay Policy and Procedures—Active Duty and Reserve Pay	Yes
	Joint Federal Travel Regulation (JFTR)	Yes

Figure 5-105. Compliance Matrix

5.5.7 Assessment of Who Should Do the Work

The action to complete this process is neither Inherently Governmental nor Military Essential. See Section 11 for additional details.

5.5.8 Risks and Mitigation

Threat/Risk Title: Adverse Impact on Service Culture

Description: Change always carries some risk, but the Lab anticipates little impact. However, care must be taken to ensure that all changes are well communicated and that any necessary training is accomplished.

Probability: Low **Impact:** Low

Mitigation: CSTO will develop and implement an appropriate communications and training plan.

Threat/Risk Title: Portal Development/Evolution Does Not Keep Pace with CST Timeline

Description: Portal development must keep pace with the demands of CST implementation. If the Portal is not ready for redesigned CST applications, their implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement and financial support may be required to keep the CST project on track.

Threat/Risk Title: DIMHRS Is Cancelled or Significantly Delayed

Description: The DIMHRS project may be cancelled or significantly delayed, making it unable to support CST.

Probability: Moderate **Impact:** Low

Mitigation: Develop a contingency plan based on COTS technology for implementing CST processes if DIMHRS is delayed and/or cancelled.

5.5.9 Training Need and Potential Career Field Impact

Training may need to be modified to reflect new processing changes and/or to prepare individuals to use the process and capabilities. The changes within this process are expected to have significant career field impact.

5.5.10 Metrics

The overarching objectives of Customer Service Transformation apply to all processes within this business area and are adequately measured using the following metrics:

- ◆ Customer satisfaction
- ◆ Self-service applications available via Portal and Contact Center
- ◆ Self-service transactions (as percent of total)
- ◆ Manpower savings

5.5.11 Benefits Analysis

5.5.11.1 Service Delivery Model

Method	As-Is	To-Be
Front-Line Support	100%	4%
Contact Center	0%	17%
Portal	0%	79%
Total	100%	100%

Figure 5-106. Service Delivery Model

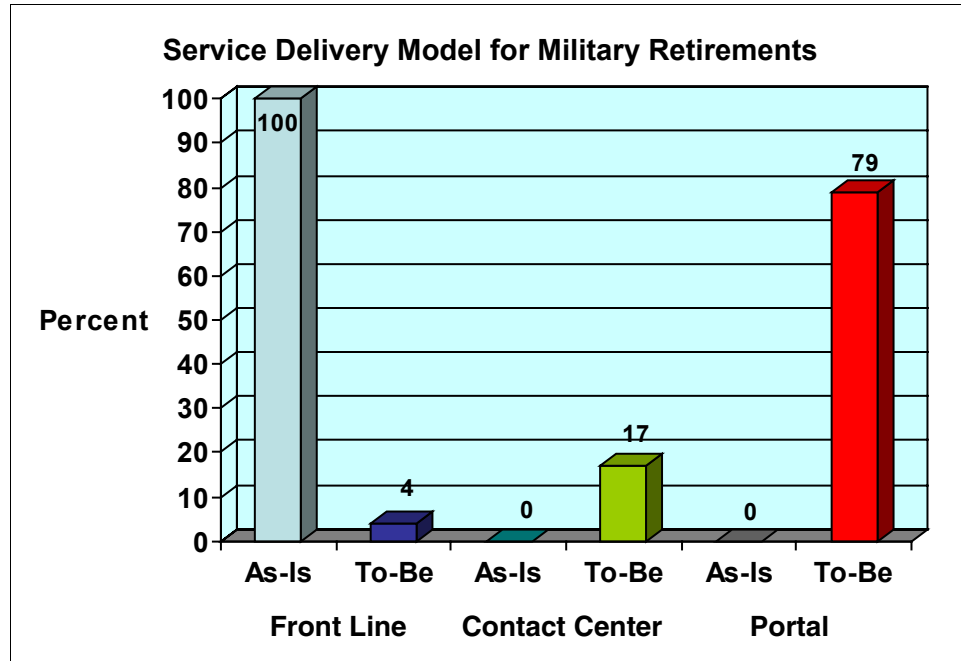


Figure 5-107. Service Delivery Model

Category	Units	To Be
HR Workload Change	Time	Decreased by 79%
Customer Workload Change	Time	Decreased by 20%
Cycle Time Compression	Days	Decreased by 0% Process Decreased by 70% HR
Web Empowerment	Time	79%
Improve Effectiveness		Accountability and tracking; access time; increased functionality, accuracy, reliability, and morale

Figure 5-108. Lab Benefits Estimate

5.6 Processes Voluntary Contributions, Deposits/Redeposits, and Refunds to/from Retirement Accounts (Civilian)

5.6.1 As-Is Process Narratives

5.6.1.1 Processes Voluntary Contributions to Retirement Fund (AFPC)

Describes the processes required for deposit into the employee's retirement fund.

5.6.1.2 Processes Voluntary Civilian Deposits/Redeposit to Retirement Fund (AFPC)

Describes the procedures required to process civilian deposit/redeposit.

5.6.1.3 Processes Voluntary Military Post-56 Military Deposits (AFPC)

Describes the procedures required to verify and process voluntary military post-56 deposit.

5.6.1.4 Processes Voluntary Refund of Retirement Contributions (AFPC)

Describes the processes required to refund retirement contributions to employees.

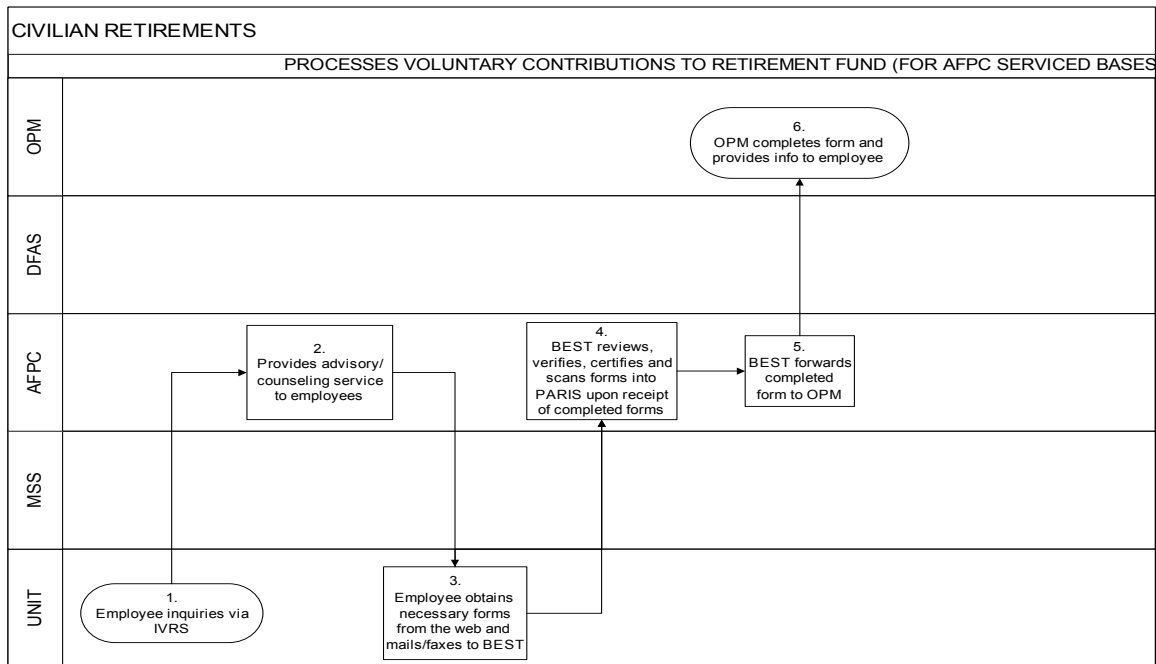


Figure 5-109. As-Is Flowchart

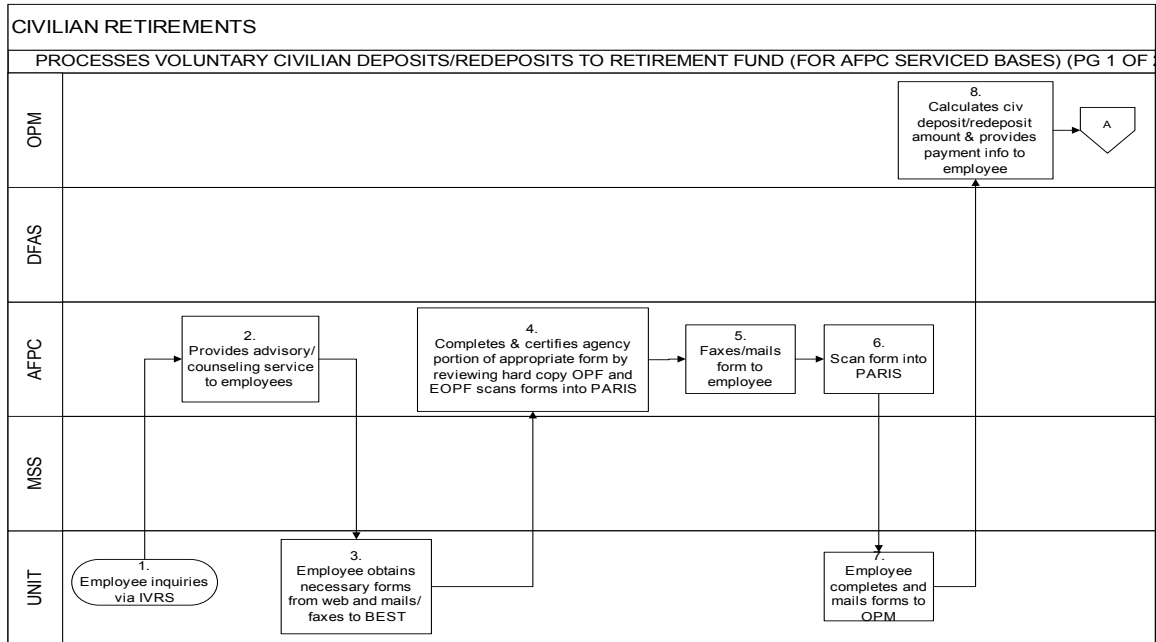


Figure 5-110. As-Is Flowchart (page 1 of 2)

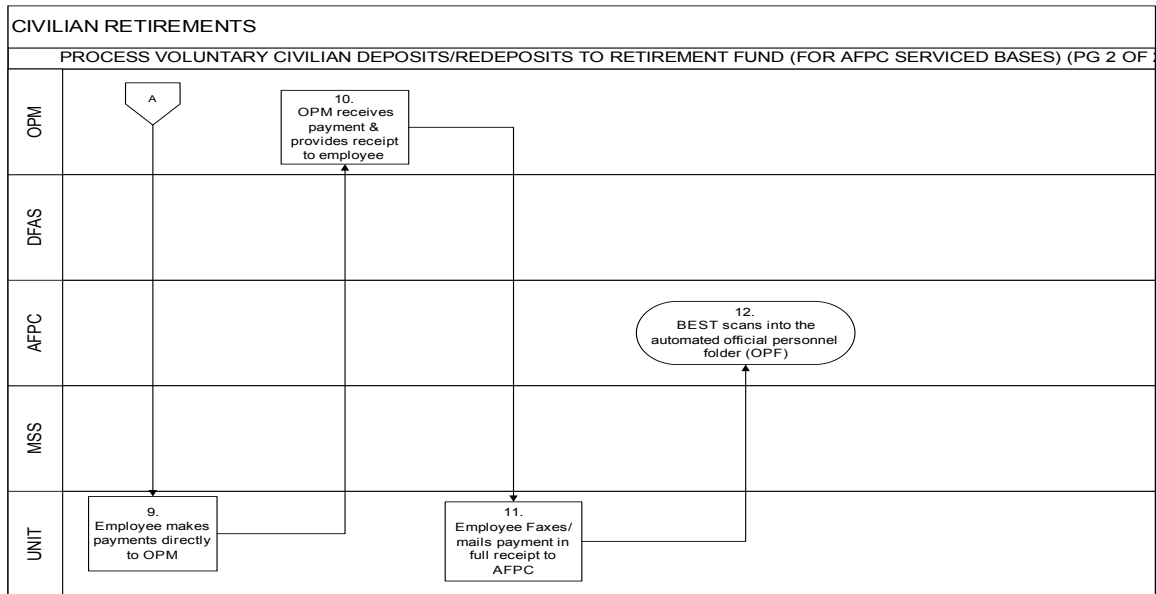


Figure 5-111. As-Is Flowchart (page 2 of 2)

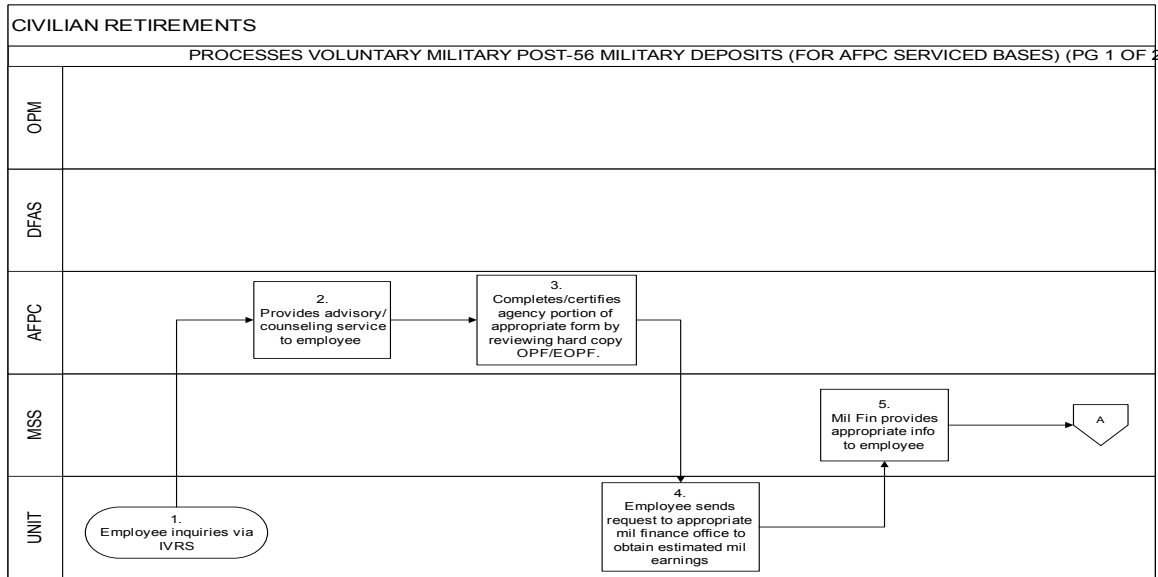


Figure 5-112. As-Is Flowchart (page 1 of 2)

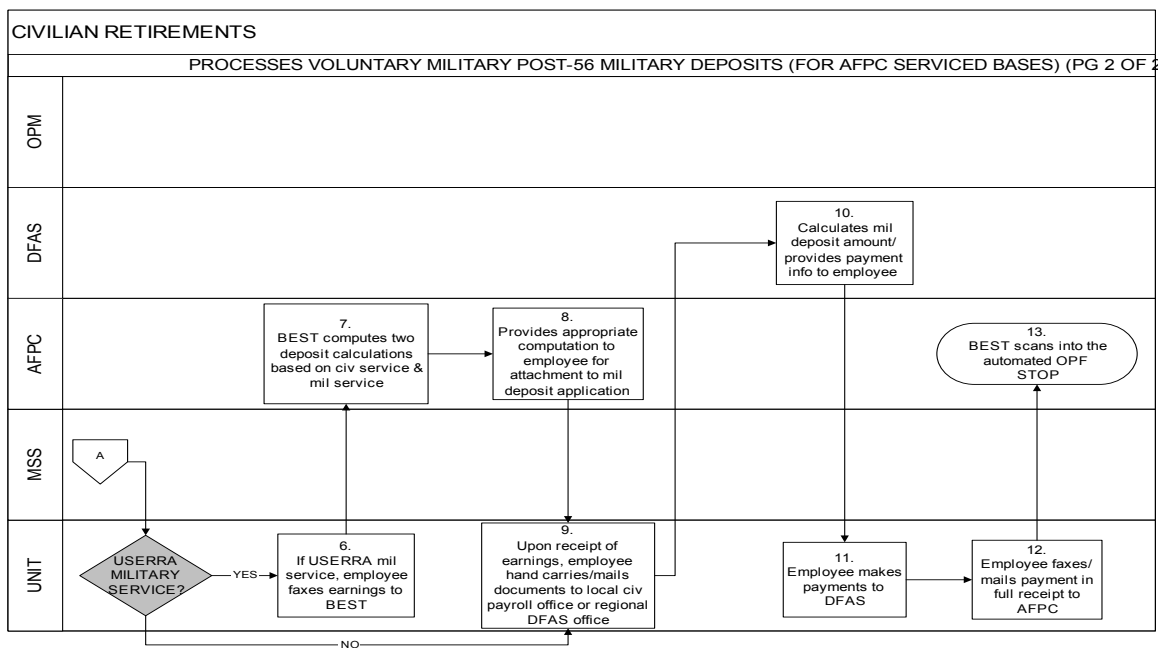


Figure 5-113. As-Is Flowchart (page 2 of 2)

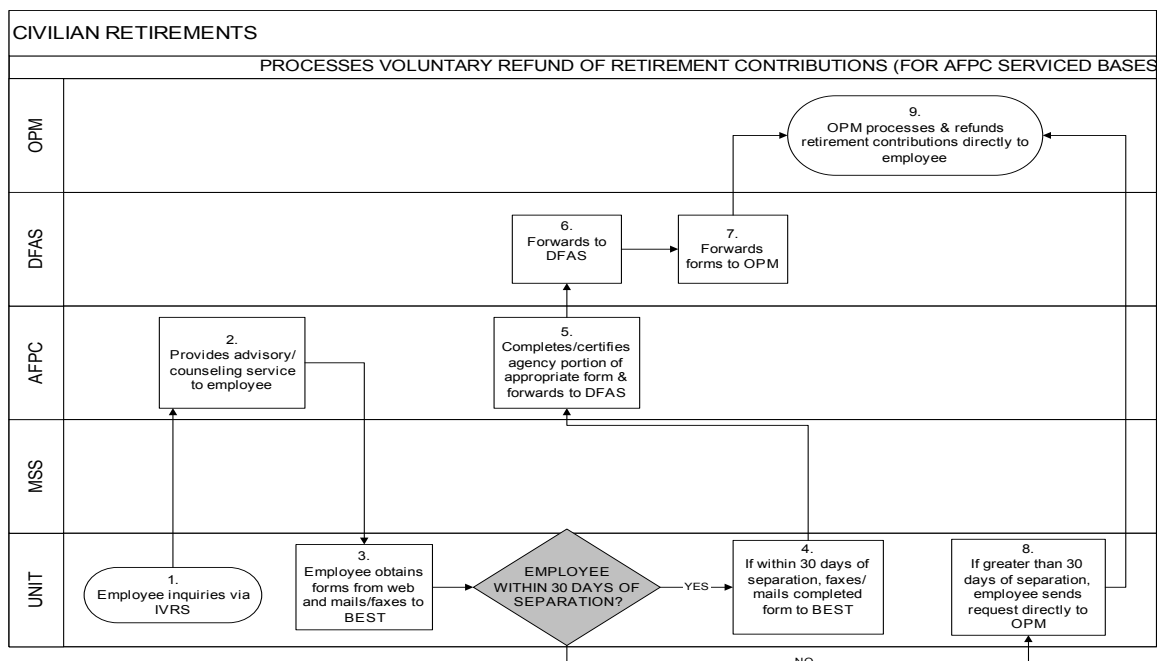


Figure 5-114. As-Is Flowchart

As-Is Level of Effort for Processes Contributions to Civilian Retirement Fund	
Cycle Time	133 days
HR Process Time	91 minutes
Count and Frequency	5,250 annually

Figure 5-115. As-Is Level of Effort

5.6.2 To-Be Process Narrative

In the To-Be process, the member will use the automated, Web-based Employee Benefits Information System (EBIS) to initiate, e-sign, and forward his or her voluntary retirement fund contributions to the Contact Center (BEST) via a content management system workflow. Help links and Contact Center personnel will be available 24x7 to assist the member.

The Contact Center receives, verifies, and certifies the information. Once they save their action, it is automatically forwarded to DFAS/OPM, which completes the review and makes the necessary deductions. The completed action triggers appropriate system notifications. The member verifies the action and authorizes electronic fund transfer.

For this process to work, the system must contain access to prior military/civilian earnings and the employee's deposit/refund/retirement contributions history via the OPM database.

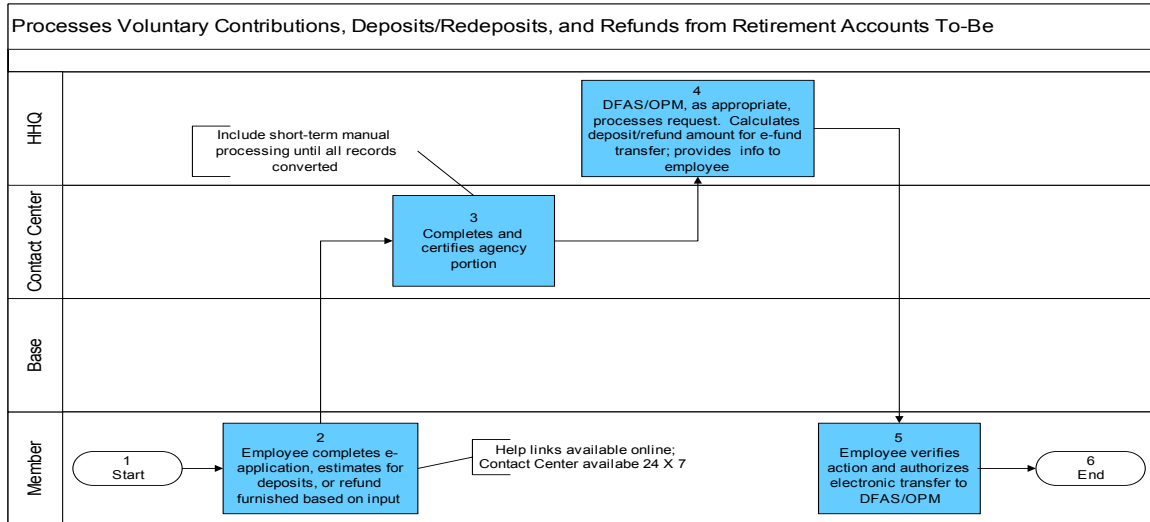


Figure 5-116. To-Be Flowchart

Comparison of As-Is and To-Be for Processes Contributions to Civilian Retirement Fund				
Cycle Time Compression	Process Time		Compression Factor	Change
	HR Time		1.2	15%
	HR Time		1.3	25%
Cycle Time Reduction		As-Is	To-Be	Change
	Days	133	113	Decreased by 20 days
	Time	91 minutes	59 minutes	-32 minutes
Average Process Time	Count	5,250	5,250	No change
	Frequency	Annual	Annual	No change

Figure 5-117. Comparison of As-Is and To-Be

5.6.3 System Fit-Gap Analysis

To-Be Process Flow	Initiate	Create	Coord	Certify	Update	Archive	Produce Document
DCPDS	N	Y	Y	Y	Y	Y	Y
DCPDS Plus	Y	Y	Y	Y	Y	Y	Y

C = Customization of COTS software recommended

N = Not available

M = Modification of COTS software recommended

Y = Available in software

Figure 5-118. System Fit-Gap Analysis

5.6.4 Data Element Fit-Gap Analysis

No change envisioned to DCPDS data elements.

5.6.5 Strategy and Phasing

Total Force	Short-Term	Mid-Term	Long-Term
Civilian	DCPDS	DCPDS	DCPDS Plus

Figure 5-119. Strategy and Phasing

5.6.6 Compliance Matrix

Reference Name	Reference Title	Affected by Changed Process
5 CFR 831	Retirement	No
5 CFR 841	Federal Employees' Retirement System—General Administration	No
5 CFR 842	Federal Employees' Retirement System—Basic Annuity	No
5 CFR 843	Federal Employees' Retirement System—Death Benefits and Employee Refunds	No
5 CFR 844	Federal Employees' Retirement System—Disability Retirement	No
5 CFR 845	Federal Employees' Retirement System—Debt Collection	No
5 CFR 846	Federal Employees' Retirement System—Elections of Coverage	No
5 USC Ch. 83	Retirement	No
5 USC Ch. 84	Reduction in Force	No
5 CFR 550.101	Pay Administration	No
AFPD 36-8	Employee Benefits and Entitlements	No
OPM Handbook	CSRS and FERS Handbook for Personnel and Payroll Offices	Yes

Figure 5-120. Compliance Matrix

5.6.7 Assessment of Who Should Do the Work

The action to complete this process is neither Inherently Governmental nor Military Essential. See Section 11 for additional details.

5.6.8 Risks and Mitigation

Threat/Risk Title: Adverse Impact on Service Culture

Description: Change always carries some risk, but the Lab anticipates little impact. However, care must be taken to ensure that all changes are well communicated and that any necessary training is accomplished.

Probability: Low **Impact:** Low

Mitigation: CSTO will develop and implement an appropriate communications and training plan.

Threat/Risk Title: Portal Development/Evolution Does Not Keep Pace with CST Timeline

Description: Portal development must keep pace with the demands of CST implementation. If the Portal is not ready for redesigned CST applications, their implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement and financial support may be required to keep the CST project on track.

Threat/Risk Title: OPM E-Business Timeline Does Not Keep Pace with CST Timeline

Description: The OPM e-business timeline may not keep pace with the requirements of CST implementation. If OPM is not ready for redesigned CST applications, new process implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement may be required to interface with OPM to keep the CST project on track.

5.6.9 Training Need and Potential Career Field Impact

Training may need to be modified to reflect new processing changes and/or to prepare individuals to use the process and capabilities. The changes within this process are expected to have minimal career field impact.

5.6.10 Metrics

The overarching objectives of Customer Service Transformation apply to all processes within this business area and are adequately measured using the following metrics:

- ◆ Customer satisfaction
- ◆ Self-service applications available via Portal and Contact Center
- ◆ Self-service transactions (as percent of total)
- ◆ Manpower savings

5.6.11 Benefits Analysis

5.6.11.1 Service Delivery Model

Method	As-Is	To-Be
Front-Line Support	5%	0%
Contact Center	95%	65%
Portal	0%	35%
Total	100%	100%

Figure 5-121. Service Delivery Model

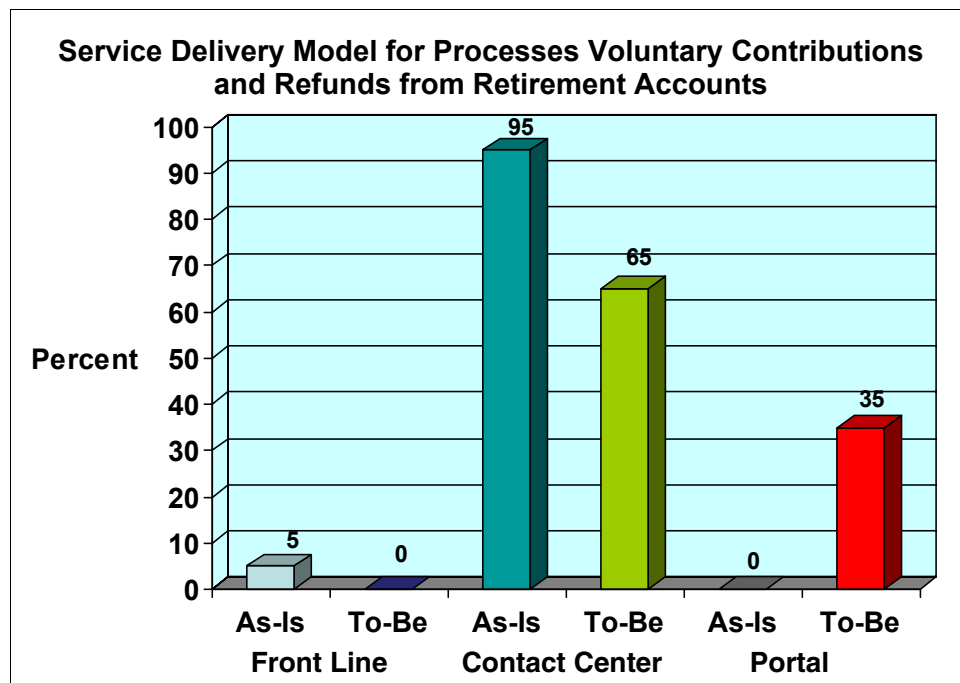


Figure 5-122. Service Delivery Model

Category	Units	To-Be
HR Workload Change	Time	Decreased by 35%
Customer Workload Change	Time	Decreased by 20%
Cycle Time Compression	Days	Decreased by 15 % Process Decreased by 25% HR
Web Empowerment	Time	35%
Improve Effectiveness		Access time; increased functionality, accuracy, reliability, and morale

Figure 5-123. Lab Benefits Estimate

5.7 Processes Federal Erroneous Retirement Coverage Corrections Act (FERCCA) or Retirement Coverage Errors (Civilian)

5.7.1 As-Is Process Narrative

5.7.1.1 Processes Federal Erroneous Retirement Coverage Corrections Act (FERCCA) and Retirement Coverage Errors (AFPC)

Describes the processes and activities required for a correction to a retirement, from employee's inquiry and initial guidance through the board's corrective decision and correction of the retirement record.

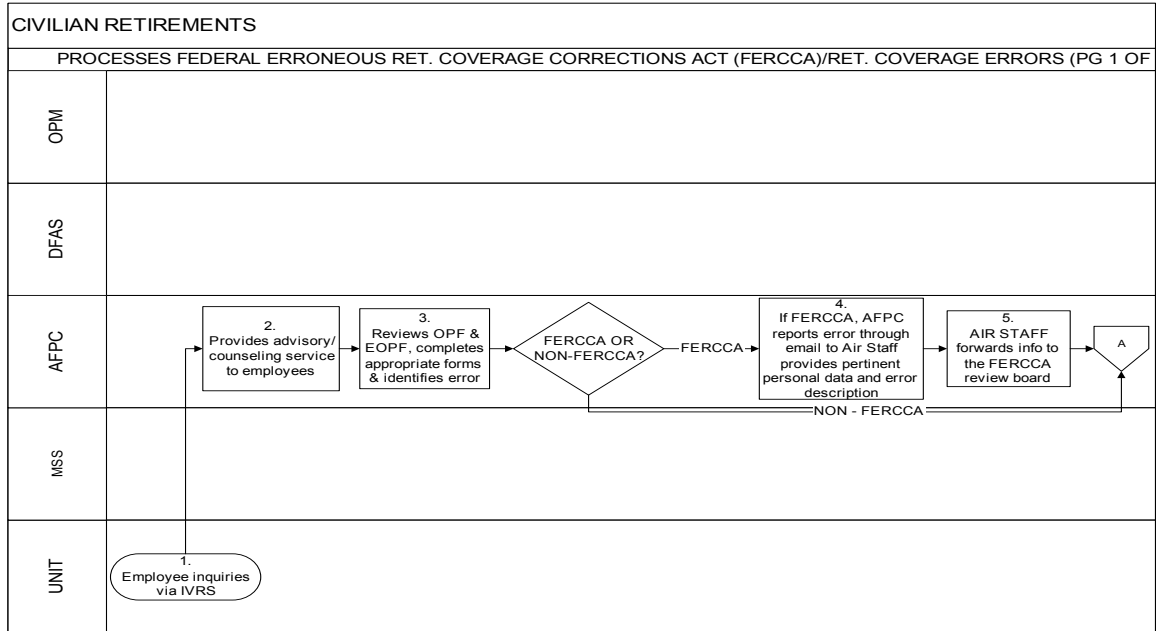


Figure 5-124. As-Is Flowchart (page 1 of 2)

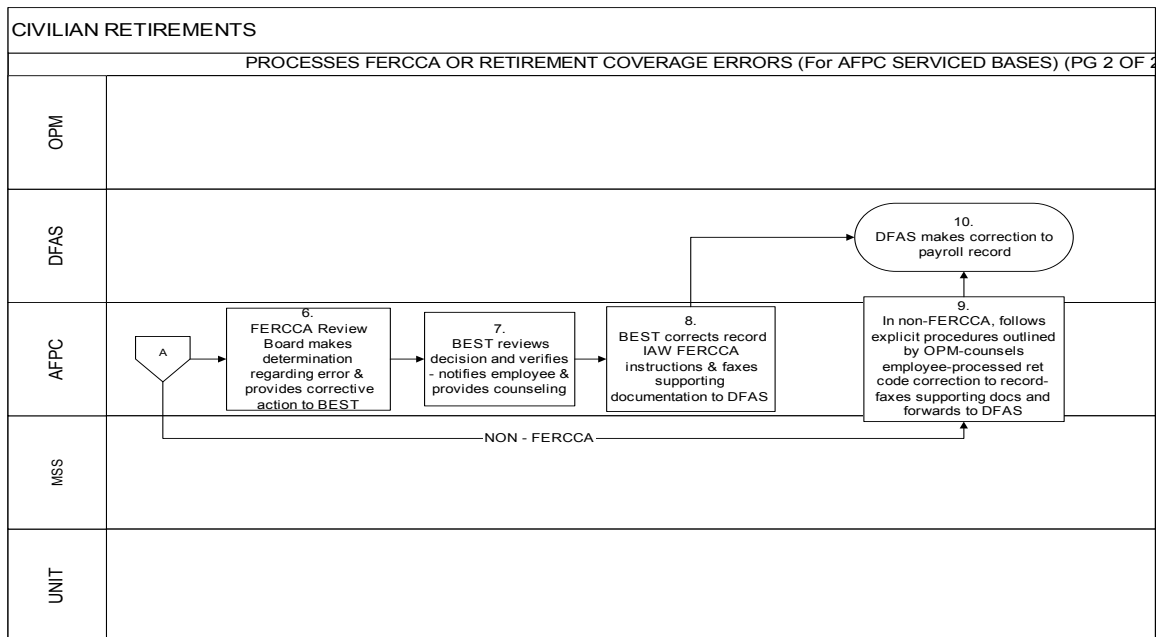


Figure 5-125. As-Is Flowchart (page 2 of 2)

As-Is Level of Effort for Processes FERCCA or Retirement Coverage Errors (Civilian)	
Cycle Time	730 days
HR Process Time	565 minutes
Count and Frequency	250 annually

Figure 5-126. As-Is Level of Effort

5.7.2 To-Be Process Narrative

This process was determined not to be a candidate for automation because OPM and Air Force leadership are about to mandate new process requirements. This is very labor-intensive and requires interaction with legacy systems and hard-copy records. However, the affected population is dwindling, so the benefits from developing an automated solution may be negligible.

The To-Be process starts when the Contact Center reviews the record, which may occur any time the record is required for HR actions, for example retirement counseling or any administrative reason. Once an HR technician identifies a potential FERCCA error, he or she will research, coordinate, and resolve it. Once the HRMS is updated with new information, it automatically notifies DFAS to adjust their financial records.

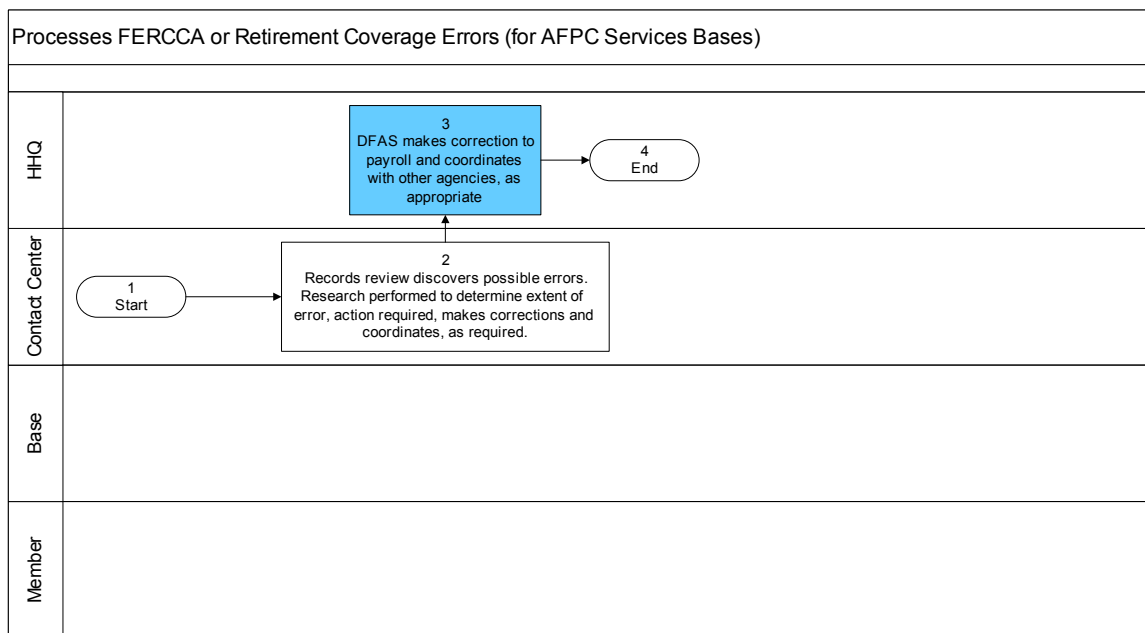


Figure 5-127. To-Be Flowchart

Comparison of As-Is and To-Be Processes FERCCA or Retirement Coverage Errors (Civilian)				
Cycle Time Compression	Process Time	Compression Factor		Change
	HR Time	1.05		5%
Cycle Time Reduction	As-Is	To-Be		Unknown Change
	Days	730	694	Decreased by 36 days
Average Process Time	Time	565 minutes	554 minutes	-11 minutes
	Count	250	250	No change
	Frequency	Annual	Annual	No change

Figure 5-128. Comparison of As-Is and To-Be

5.7.3 System Fit-Gap Analysis

To-Be Process Flow	Initiate	Create	Coord	Certify	Update	Archive	Produce Documentt
DCPDS	N	Y	Y	Y	Y	Y	Y
DCPDS Plus	Y	Y	Y	Y	Y	Y	Y

C = Customization of COTS software recommended

N = Not available

M = Modification of COTS software recommended

Y = Available in software

Figure 5-129. System Fit-Gap Analysis

5.7.4 Data Element Fit-Gap Analysis

No change envisioned to DCPDS data elements.

5.7.5 Strategy and Phasing

Total Force	Short-Term	Mid-Term	Long-Term
Civilian	DCPDS	DCPDS	DCPDS Plus

Figure 5-130. Strategy and Phasing

5.7.6 Compliance Matrix

Reference Name	Reference Title	Affected by Changed Process
5 CFR 831	Retirement	No
5 CFR 841	Federal Employees' Retirement System—General Administration	No
5 CFR 842	Federal Employees' Retirement System—Basic Annuity	No
5 CFR 843	Federal Employees' Retirement System—Death Benefits and Employee Refunds	No
5 CFR 844	Federal Employees' Retirement System—Disability Retirement	No
5 CFR 845	Federal Employees' Retirement System—Debt Collection	No
5 CFR 846	Federal Employees' Retirement System—Elections of Coverage	No
5 USC Ch. 83	Retirement	No
5 USC Ch. 84	Reduction in Force	No
5 CFR 550.101	Pay Administration	No
AFPD 36-8	Employee Benefits and Entitlements	No
OPM Handbook	CSRS and FERS Handbook for Personnel and Payroll Offices	Yes

Figure 5-131. Compliance Matrix

5.7.7 Assessment of Who Should Do the Work

The action to complete this process is neither Inherently Governmental nor Military Essential. See Section 11 for additional details.

5.7.8 Risks and Mitigation

Threat/Risk Title: Adverse Impact on Service Culture

Description: Change always carries some risk, but the Lab anticipates little impact. However, care must be taken to ensure that all changes are well communicated and that any necessary training is accomplished.

Probability: None

Impact: None

Mitigation: CSTO will develop and implement an appropriate communications and training plan.

Threat/Risk Title: Portal Development/Evolution Does Not Keep Pace with CST Timeline

Description: Portal development must keep pace with the demands of CST implementation. If the Portal is not ready for redesigned CST applications, their implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: None **Impact:** None

Mitigation: Significant senior leadership involvement and financial support may be required to keep the CST project on track.

Threat/Risk Title: OPM E-Business Timeline Does Not Keep Pace with CST Timeline

Description: The OPM e-business timeline may not keep pace with the requirements of CST implementation. If OPM is not ready for redesigned CST applications, new process implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement may be required to interface with OPM to keep the CST project on track.

5.7.9 Training Need and Potential Career Field Impact

Training may need to be modified to reflect new processing changes and/or to prepare individuals to use the process and capabilities. The changes within this process are expected to have minimal career field impact.

5.7.10 Metrics

The overarching objectives of Customer Service Transformation apply to all processes within this business area and are adequately measured using the following metrics:

- ◆ Customer satisfaction
- ◆ Self-service applications available via Portal and Contact Center
- ◆ Self-service transactions (as percent of total)
- ◆ Manpower savings

5.7.11 Benefits Analysis**5.7.11.1 Service Delivery Model**

Method	As-Is	To-Be
Front-Line Support	0%	0%
Contact Center	100%	98%
Portal	0%	2%
Total	100%	100%

Figure 5-132. Service Delivery Model

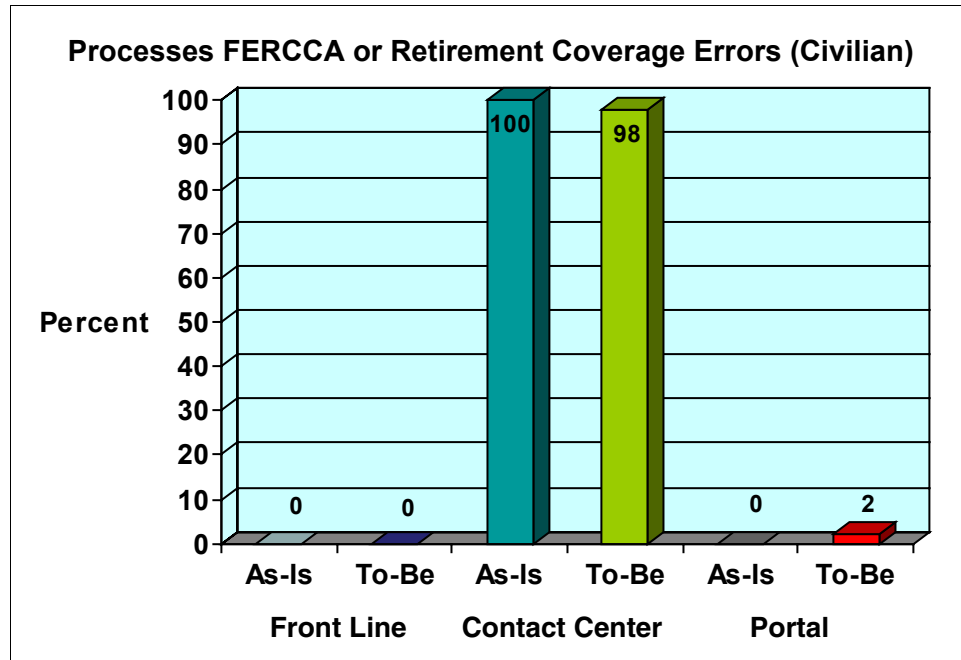


Figure 5-133. Service Delivery Model

Category	Units	To-Be
HR Workload Change	Time	Decreased by 2%
Customer Workload Change	Time	Decreased by 0%
Cycle Time Compression	Days	Decreased by 5% Process Unknown HR
Web Empowerment	Time	2%
Improve Effectiveness		Increased functionality, accuracy, reliability, and morale

Figure 5-134. Lab Benefits Estimate

5.8 Processes Civilian Retirement Counseling/Estimate

5.8.1 As-Is Process Narrative

5.8.1.1 Processes Civilian Counseling/Estimate

Establishes operational guidance and procedures for providing retirements counseling and estimates on retired pay.

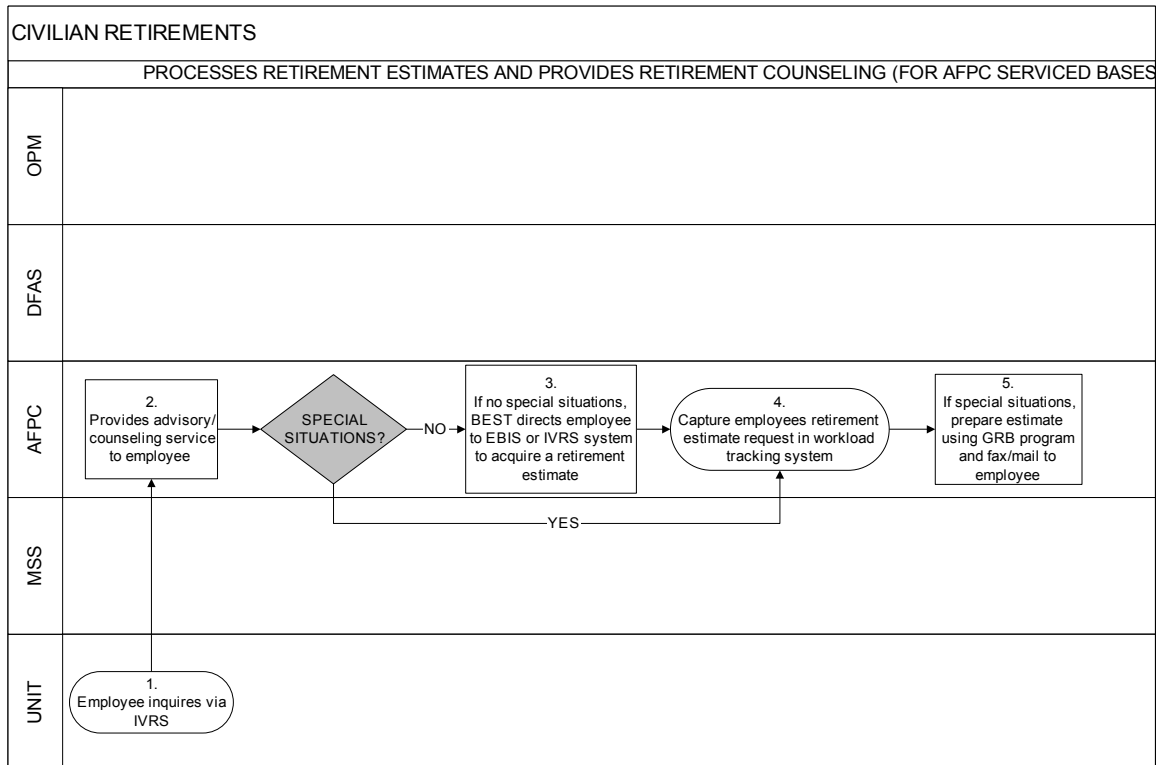


Figure 5-135. As-Is Flowchart

As-Is Level of Effort for Civilian Retirement Counseling/Estimate	
Cycle Time	18 days
HR Process Time	136 minutes
Count and Frequency	3,750 annually

Figure 5-136. As-Is Level of Effort

5.8.2 To-Be Process Narrative

The To-Be process is optimized by Web-based help links, tutorials, calculators, and e-briefings, which should eliminate the need for the member to call for counseling. In the event the member still requires customized assistance, he or she contacts the Contact Center via phone or Web to request counseling. This may be accomplished at any time during the member's career. The Contact Center reviews the member's records and provides the necessary retirement/benefit counseling. The Contact Center may make some corrections/elections online or provide the member with appropriate directions/links for application.

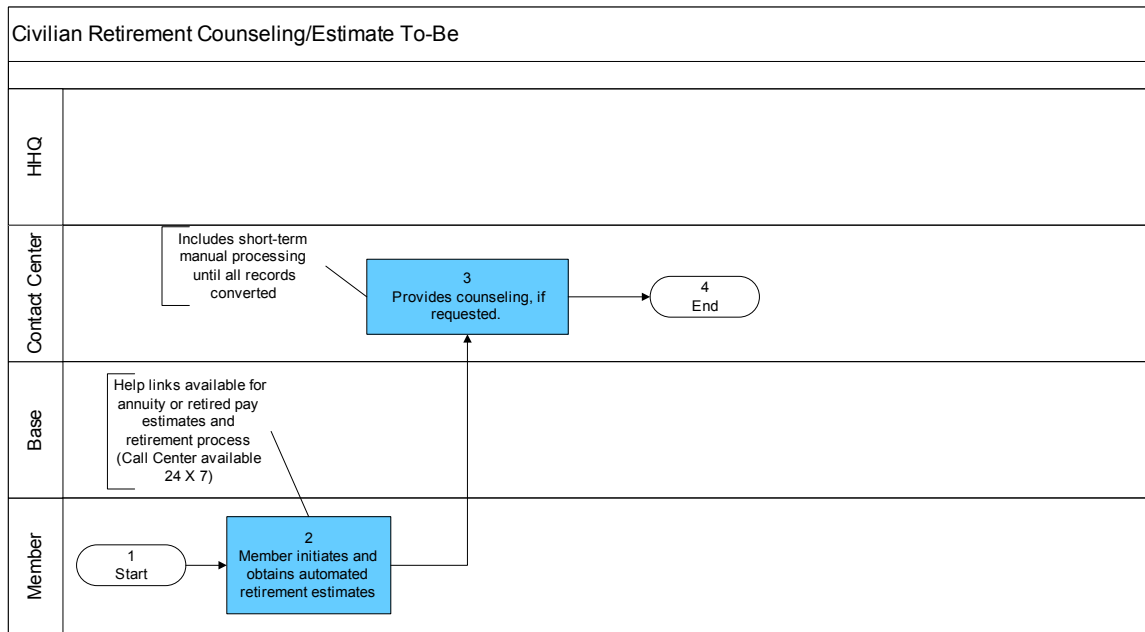


Figure 5-137. To-Be Flowchart

Comparison of As-Is and To-Be for Civilian Retirement Counseling/Estimate				
Cycle Time Compression	Process Time	Compression Factor		Change
	HR Time	1 1.25		0% 20%
Cycle Time Reduction		As-Is	To-Be	Change
	Days	18	18	Decreased by 0 days
Average Process Time	Time	136 minutes	88 minutes	-48 minutes
	Count	3,750	3,750	No change
	Frequency	Annual	Annual	No change

Figure 5-138. Comparison of As-Is and To-Be

5.8.3 System Fit-Gap Analysis

To-Be Process Flow	Initiate	Create	Coord	Certify	Update	Archive	Produce Document
DCPDS	N	Y	Y	Y	Y	Y	Y
DCPDS Plus	Y	Y	Y	Y	Y	Y	Y

C = Customization of COTS software recommended N = Not available
M = Modification of COTS software recommended Y = Available in software

Figure 5-139. System Fit-Gap Analysis

5.8.4 Data Element Fit-Gap Analysis

No change envisioned to DCPDS data elements.

5.8.5 Strategy and Phasing

Total Force	Short-Term	Mid-Term	Long-Term
Civilian	DCPDS	DCPDS	DCPDS Plus

Figure 5-140. Strategy and Phasing

5.8.6 Compliance Matrix

Reference Name	Reference Title	Affected by Changed Process
5 CFR 831	Retirement	No
5 CFR 841	Federal Employees' Retirement System—General Administration	No
5 CFR 842	Federal Employees' Retirement System—Basic Annuity	No
5 CFR 843	Federal Employees' Retirement System—Death Benefits and Employee Refunds	No
5 CFR 844	Federal Employees' Retirement System—Disability Retirement	No
5 CFR 845	Federal Employees' Retirement System—Debt Collection	No
5 CFR 846	Federal Employees' Retirement System—Elections of Coverage	No
5 USC Ch. 83	Retirement	No
5 USC Ch. 84	Reduction in Force	No
5 CFR 550.101	Pay Administration	No
AFPD 36-8	Employee Benefits and Entitlements	No
OPM Handbook	CSRS and FERS Handbook for Personnel and Payroll Offices	Yes

Figure 5-141. Compliance Matrix

5.8.7 Assessment of Who Should Do the Work

The action to complete this process is neither Inherently Governmental nor Military Essential. See Section 11 for additional details.

5.8.8 Risks and Mitigation

Threat/Risk Title: Adverse Impact on Service Culture

Description: Change always carries some risk, but the Lab anticipates little impact. However, care must be taken to ensure that all changes are well communicated and that any necessary training is accomplished.

Probability: Moderate **Impact:** Low

Mitigation: CSTO will develop and implement an appropriate communications and training plan.

Threat/Risk Title: Portal Development/Evolution Does Not Keep Pace with CST Timeline

Description: Portal development must keep pace with the demands of CST implementation. If the Portal is not ready for redesigned CST applications, their implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement and financial support may be required to keep the CST project on track.

Threat/Risk Title: OPM E-Business Timeline Does Not Keep Pace with CST Timeline

Description: The OPM e-business timeline may not keep pace with the requirements of CST implementation. If OPM is not ready for redesigned CST applications, new process implementation will be delayed and shifting of resources will not occur as rapidly as desired.

Probability: Moderate **Impact:** High

Mitigation: Significant senior leadership involvement may be required to interface with OPM to keep the CST project on track.

5.8.9 Training Need and Potential Career Field Impact

Training may need to be modified to reflect new processing changes and/or to prepare individuals to use the process and capabilities. The changes within this process are expected to have moderate career field impact.

5.8.10 Metrics

The overarching objectives of Customer Service Transformation apply to all processes within this business area and are adequately measured using the following metrics:

- ◆ Customer satisfaction
- ◆ Self-service applications available via Portal and Contact Center
- ◆ Self-service transactions (as percent of total)
- ◆ Manpower savings

5.8.11 Benefits Analysis

5.8.11.1 Service Delivery Model

Method	As-Is	To-Be
Front-Line Support	0%	0%
Contact Center	100%	65%
Portal	0%	35%
Total	100%	100%

Figure 5-142. Service Delivery Model

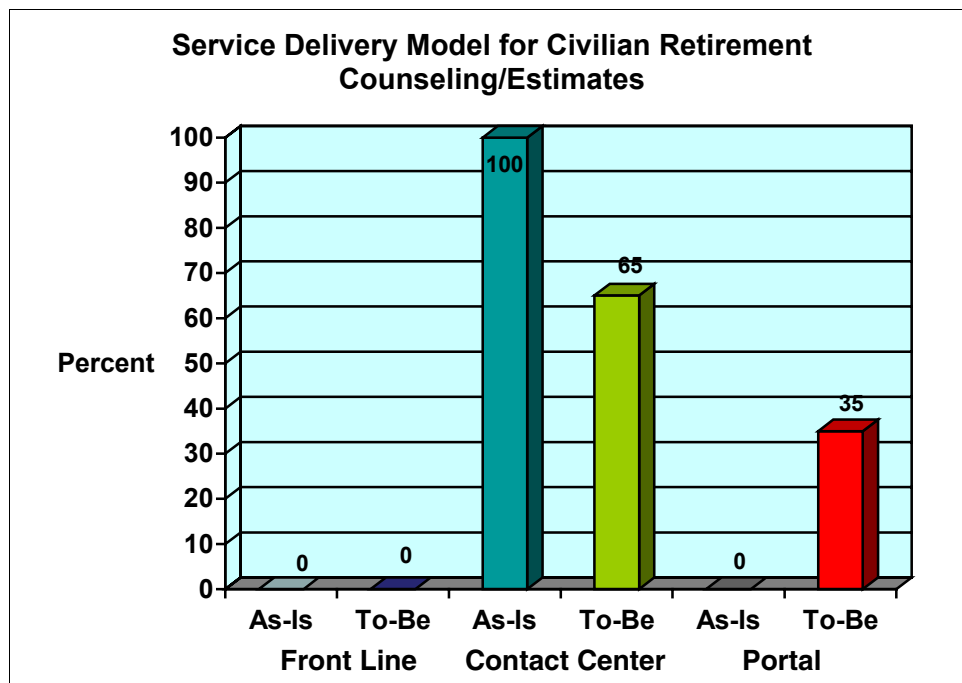


Figure 5-143. Service Delivery Model

Category	Units	To-Be
HR Workload Change	Time	Decreased by 35%
Customer Workload Change	Time	Decreased by 0%
Cycle Time Compression	Days	Decreased by 0% Process Decreased by 20% HR
Web Empowerment	Time	35%
Improve Effectiveness		Access time; increased functionality, accuracy, reliability, and morale

Figure 5-144. Lab Benefits Estimate

6. Description of Evaluated Solutions

6.1 Proof-of-Concept Description for Retirement Action—Military

Because the AF Portal vision is for a “one-stop shop,” its design will allow the Air Force member to access day-to-day functions and more.

For example, if a member decides it is time to retire, they would log on to the AF Portal to submit a retirement application. The member accesses the Human Resources (HR) tab and starts the retirement process. After the member completes the pre-application checklist and the application, his or her final signature activates the system, which routes the application to the unit. The unit commander or designated representative receives the application and completes the necessary research to provide a recommendation. In this example, the recommendation is to approve the retirement request. The application is then routed to the Decision Authority for review. The Decision Authority decides to approve the retirement request, which prompts applicable system updates, creates and archives the retirement order, and sends out the appropriate notifications. The member receives notification of the final action and is provided a checklist to start the formal retirement process. The member then goes to each required office to out-process. Each office electronically clears the member from the out-processing list. Upon checklist completion, the member receives notice to electronically preview and sign the DD Form 214 (Certificate of Release or Discharge from Active Duty). The e-signature routes the DD Form 214 to the Contact Center. An HR specialist performs a quality check and approves the DD Form 214, which is then archived. The systems are updated and appropriate notifications made. The member receives notice regarding approved DD Form 214, retirement payments, and specific ceremony requirements. The process is complete and the member retires from the Air Force.

The member logs into the Air Force Portal (**figure 6-1**).

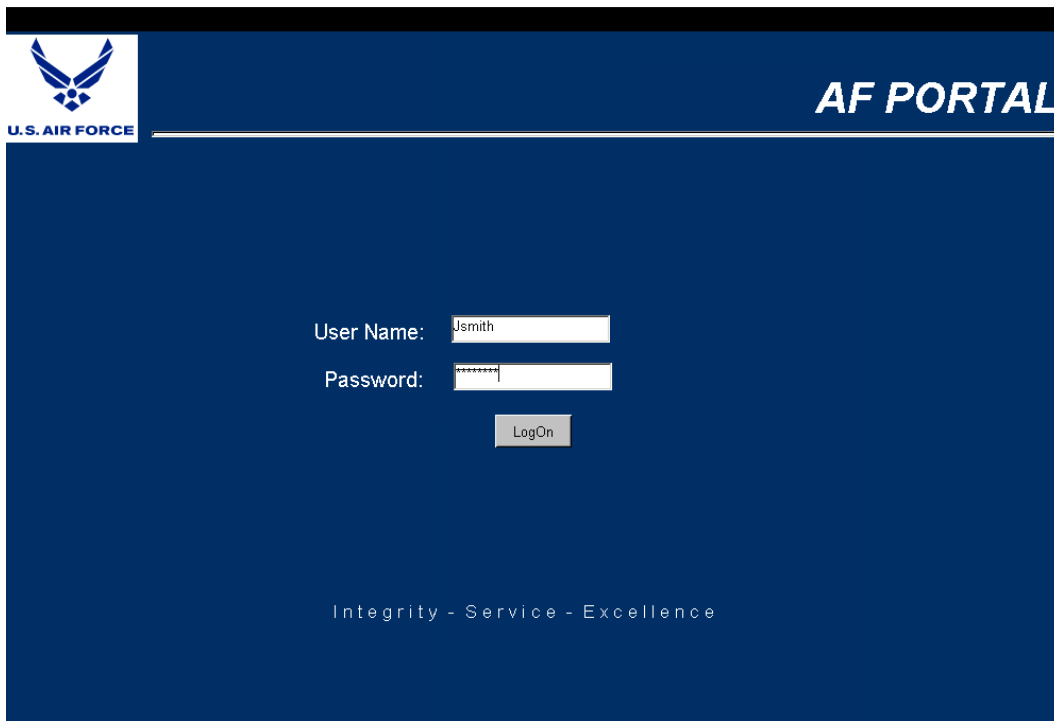


Figure 6-1. Air Force Portal Logon

The member arrives at MyPortal to start the retirement process (**figure 6-2**). Because this is a HR function, the member clicks on the HR tab.

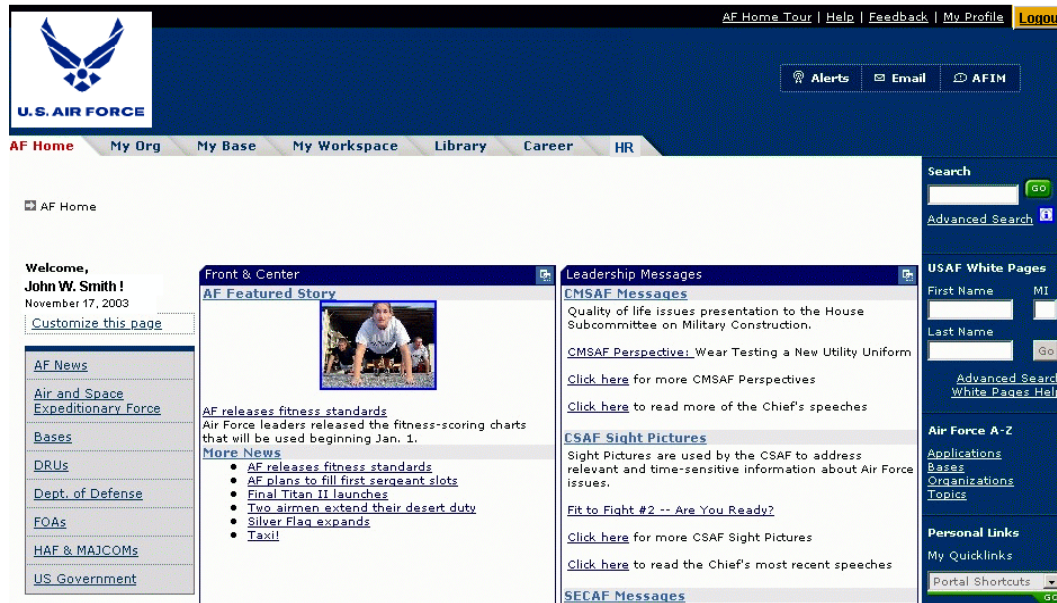


Figure 6-2. MyPortal Page

The member enters the HR area, reviews Retirements portlet options, and chooses the retirement application (**figure 6-3**). If the member requires assistance, help functions are available by clicking on the “?” The Retirements portlet also contains various video presentations that may assist the member with retirement decisions.

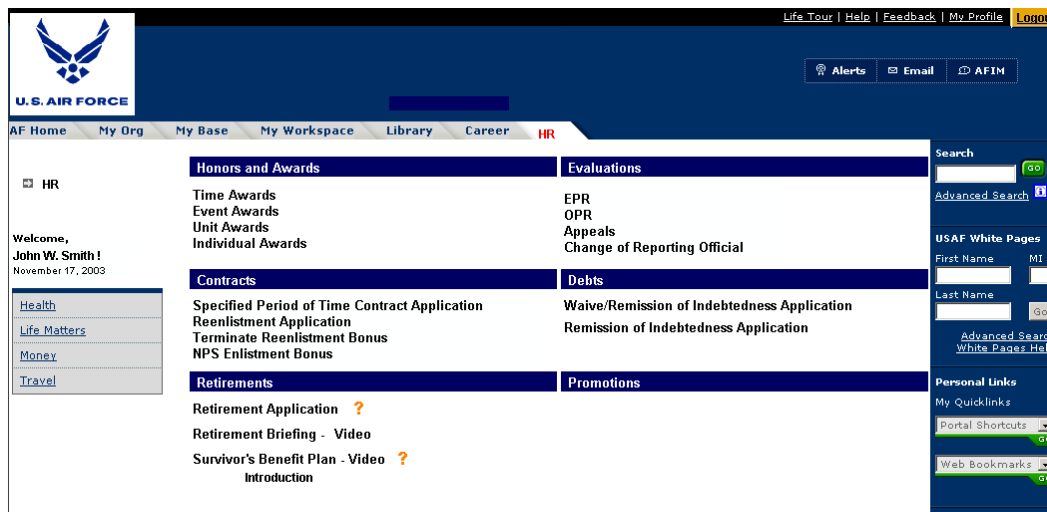


Figure 6-3. HR Page

The member is given access to the Information Management Tool (IMT), which contains the pre-retirement application checklist (**figure 6-4**). The member must complete the checklist prior to gaining access to the actual application. The “?” allows access to the applicable instruction manual or help functions. After the checklist is completed, the member’s signature prompts the system to allow access to the application.



Military Retirement Pre-Application Checklist ?

U.S. AIR FORCE

Pre-Application Checklist AFI36-3203, Attachment 7

Read all the areas in bold type and check off the box when completed.

I understand that by applying for retirement, I: ☒

- Remain liable for assignment or training within the limits of the retirement date asked for or approved.
- May not incur a voluntary service commitment that goes beyond an approved retirement date unless I withdraw the application or receive approval of a request for change in retirement date.
- Do not have to fulfill an involuntary service commitment if it goes beyond an approved retirement date, except in unusual circumstances.
- May become ineligible to reenlist.
- May have to reimburse the Government the cost of advanced education equal to any unserved or unearned portion of a service commitment incurred due to Advanced Education Assistance programs.

If stationed overseas, I become ineligible for promotion if I apply for retirement on or after the 25th day of the 8th month prior to their DEROS. EXCEPTION: Overseas members who file retirement applications due to HYT, do not become ineligible for promotion. ☒

If I plan to request leave in connection with retirement (Terminal Leave), I understand that: ☒

- I must apply for retirement far enough in advance to allow at least 4 months of lead time for processing the application and issuing orders, plus the desired number of days of leave. (EXAMPLE: If my requested retirement date is 1 July, and I want 30 days of terminal leave, I submit my application no later than 1 February.) Otherwise, I might not receive retirement orders before the date I am scheduled to depart on terminal leave.
- I understand that authorization for leave in connection with retirement (terminal leave) is not automatic. My commander must approve it.
- I understand that I may not extend my approved retirement date, or withdraw my application, solely to allow me to take terminal leave.

I understand that if I am applying for retirement under the 7-day option program, I must apply within the time period after assignment notification and for a date within the time period specified in the referenced instructions. If I am an enlisted member, I understand that an approved application for retirement under the 7-day option program may make me ineligible for promotion. ☒

I understand that after my requested retirement date has been approved: ☒

- I may withdraw my application for retirement or extend the effective date of retirement only for one of these reasons:
 - For a fully documented hardship that has occurred since I applied for retirement.
 - In the best interest of the Air Force.
 - To accept a valid active duty promotion that I was selected for and notified of after I applied for retirement.
- I normally will not be allowed to withdraw if I applied for retirement under the 7-Day Option (7DO) program.
- I can expect to retire on the approved date unless I am placed in administrative hold or medical hold (approved only by HQ AFMPC/DPMMM) and should remain in either status beyond my approved date. However, I can be carried past my original retirement date only if my orders are rescinded by HQ AFMPC/DPMARR2 (AFDPOB for colonels) before the effective date.
- I may not request extension or withdrawal of an approved retirement for the sole purpose of receiving promotion consideration during a forthcoming cycle.

If I am an enlisted member and my DOS precludes my retirement on completion of the maximum active service allowed for my grade, I understand I may request a 1-month enlistment extension in order to retire on the 1st day of the month following the month in which my HYT date occurs. ☒

Figure 6-4. Pre-Application Checklist IMT

I have been counseled on the effect my proposed retirement date will have on my retired pay and have been given a retired pay estimate.

- I understand that DFAS-CL computes retired pay under the applicable formula established by law, according to my grade and years of service. Retired pay is computed by multiplying the monthly active duty base pay I receive now, or will receive at time of retirement, by 2-1/2 percent for each year of active service, if I am retiring in an enlisted status, or each year of service creditable under 10 U.S.C. 1405, if I am retiring as an officer. I understand that my retired pay may also be computed, if more favorable to me, using the provision of law in 10 U.S.C. 1401a(f) as shown in paragraph 7.6.3.
- I understand that military members are paid a specified amount of basic pay when they have served 1 day past any longevity-increase point established within each pay grade. For colonels, master sergeants, senior master sergeants, and chief master sergeants, longevity increases in basic pay occur at the "over 20," "over 22," "over 24" and "over 26" years of service points. To receive active duty and retired pay at any longevity-increase point, I understand I must have completed the full number of years of service, plus 1 day. EXAMPLE: To be paid at "over 22" I must have completed the full 22 years plus 1 day of service. If I have not served that 1 extra day, I understand DFAS-CL will compute my pay on the next lower longevity increase; that is, if I have exactly 22 years of service for basic pay, my pay must be computed on rates "over 20."
- I understand that service for the retired pay multiplier is credited differently. In addition to the years of active service (enlisted) or 1405 service (officers) completed, I will be credited with each month completed at the rate of 1/12 of 2-1/2 percent per month. EXAMPLE: An enlisted member who has 20 years and 1 month of active service has a retired pay multiplier of 50.21 percent; 21 years and 7 months, 53.95 percent, and so on. (continued)

I have been counseled on the effect my proposed retirement date will have on my retired pay and have ☒ been given a retired pay estimate.

- For officers, the retired pay multiplier is determined by their service computed under 10 U.S.C. 1405, as indicated in paragraph A7.7.3. Officers' 1405 service is the same as their service for basic pay unless they had a break in active service or performed inactive Reserve service after 1 June 1958 (the date that 10 U.S.C. 1405 was enacted). The service that is creditable under section 1405 is shown in AFI 36-3203, attachment 8, paragraph A8.3. Also, HQ AFMPC Records Management Division computes 1405 service dates for all retirement-eligible officers from the officer's master personnel records and enters them in the PDS. Base-level personnel may retrieve these dates by entering DIN SAI.
- I understand that if my retirement is effective on the same date as an active duty pay raise, my retired pay may be computed on the new pay rates (see AFI 36-3203, paragraph 7.6.4)--unless I am an officer retiring with less than 20 years and 1 month of active military service or a Regular colonel retiring on my mandatory retirement date as established under pre-DOPMA laws (see AFI 36-3203, table 4.1, note 2).
- I certify that all aspects of retired pay have been explained to me to my satisfaction, and how they may apply in my case. Appropriate personnel have discussed my retired pay estimate with me, and I fully understand how they calculated it. I further understand that, once I have chosen a retirement date, I may not extend that date or withdraw my application for the sole purpose of increasing my retired pay.
- I understand that if I have received separation, severance or readjustment pay under any provision of law for service in the armed forces, and if I later qualify for retired pay, that DFAS-CL will reduce each payment of retired pay until the total amount deducted equals the total amount of separation, severance or readjustment pay.

I understand that if the appropriate HQ approves my retirement application, and I am within 1 year of retirement, I can expect to receive retirement orders within 60 days from the date the MPF hears of the approval. ☒

I understand that if I am a retired Regular member, or a member of the Retired Reserve who has retired under 10 U.S.C. 8911 or 8914, the SAF may order me to active duty at any time after I retire (10 U.S.C. 688). If I am a member of the Retired Reserve and have not completed 20 years of active service, I understand the SAF will not recall me involuntarily unless the SAF determines that not enough qualified Reserves are readily available to supply the needed skills (10 U.S.C. 672[a] and 675). ☒

I acknowledge that I have been advised of the effects of my retirement application and am satisfied that all the subjects in this paper have been adequately covered. I have been given the opportunity to ask additional questions or request further information in connection with my retirement.

Name: (Last, First, Middle Initial, Grade) Date:

Smith, John W. SSgt 20031117

[Previous](#)

Figure 6-4. Pre-Application Checklist IMT (continued)

The member is provided the retirement application (**figure 6-5**). The governing authority, principle purpose, and disclosure information are provided for reference.



U.S. AIR FORCE

Military Retirement Application ?

Authority: Title 10, U.S.S. Chapters 33, 59, 63, 67, 69, 71, 835, 867, 869, 1223; 10 U.S.C. 8013; 44 U.S.C. 3101, and EO 9397.

Principle Purpose: To process the application for retirement; request waiver of retirement restriction, change of month or withdraw approved application and similar actions. Used for establishing date of retirement, determining retired grade, preparing documents including retirement order, and evaluating information justifying a waiver request. The SSN is used for identification.

Disclosure is Voluntary: Refusal to divulge information may delay or halt further processing of the case, preclude proper evaluation of a hardship situation, and jeopardize member's entitlement to retired pay benefits. SSN is necessary to ensure positive identification.

Next

Figure 6-5. Retirement Application

The application is prepopulated based on the member's portal login so the member only has to fill in the specifics (**figure 6-6**). The signature will activate the workflow system, and the application is sent to unit level for verification.



U.S. AIR FORCE

Military Retirement Application ?

Member Information

Name: (Last, First, Middle Initial)	SSN	Grade	Current Reserve Grade
Smith, John W.	555-66-7777	SSgt	
Unit of Assignment	Place Retirement Desired	Highest Active Duty Grade	
Randolph AFB, TX			

Extraordinary Heroism Entitlement (Airmen Only)
☐ Established ☐ Claimed ☒ Not Applicable

Reserve Status
☒ Current Assignment to Retired Reserve is Acknowledged
☒ Transfer to Retired Reserve is Acknowledged
☒ Request for Discharge from Regular Airman Status

Action Requested
☒ Voluntary Retirement
☐ Change Approved Date of Retirement
☐ Withdraw Approved Retirement
☐ Retire on Mandatory Date (Officers Only)

I have read AFI 36-3203, para 2.11, 3.2.5. and Chapter 7 and understand the effects of the requested action. I request approval of the actions checked.

Effective Date of Action Date Applicant Signed
 20040101 20031117

Signature

Figure 6-6. Application Completed

The unit commander or designated representative receives a task alert (**figure 6-7**).

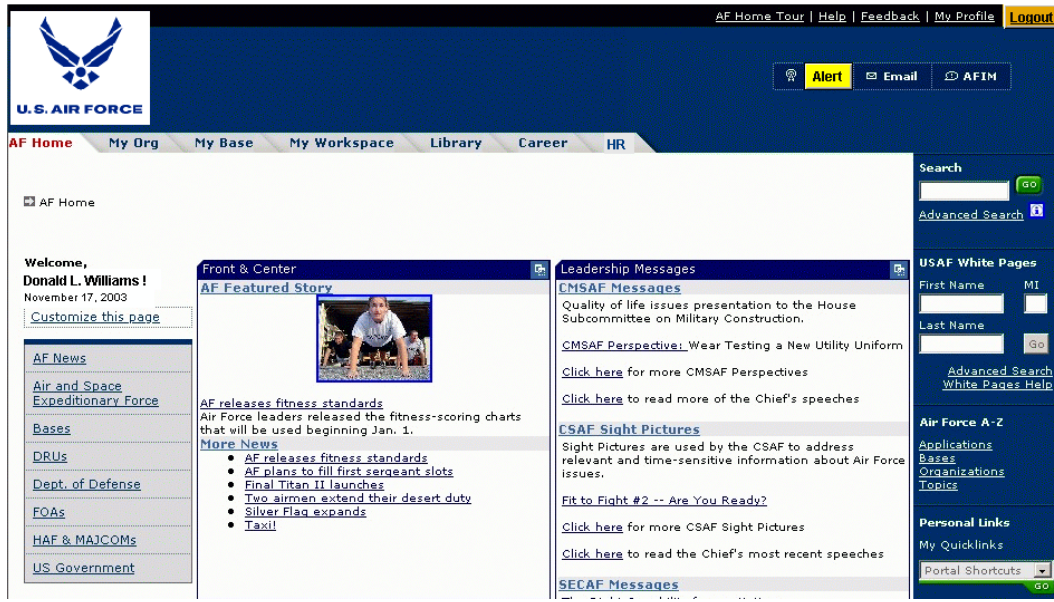


Figure 6-7. Alert Notification

The unit representative receives the retirement application requiring action (figure 6-8). The task is accessed to start the review process.

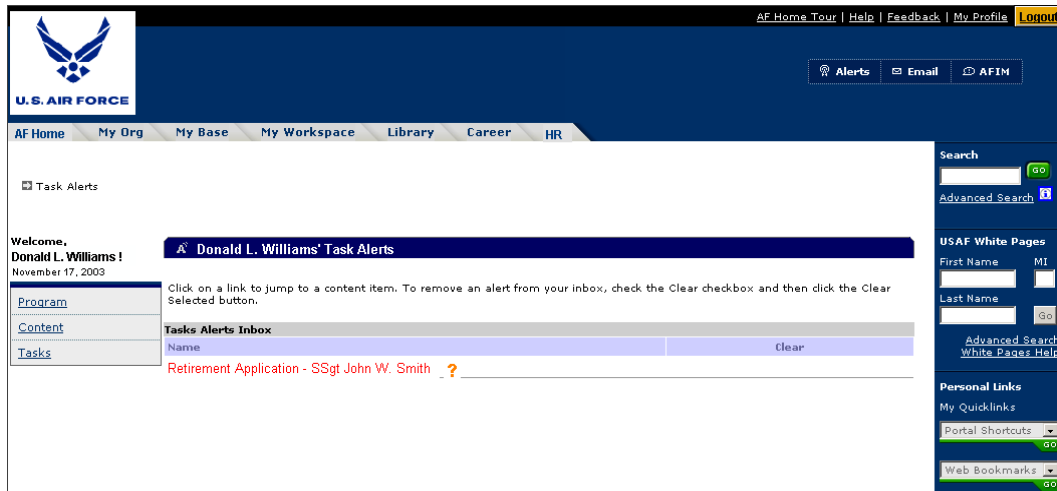


Figure 6-8. Pending Task

The unit representative reviews the member's completed application (figure 6-9). The digital signatures validate that the information is from the member. The unit representative continues to conduct research on the member and then makes a recommendation.



Military Retirement Application ?

U.S. AIR FORCE

Pre-Application Checklist Verification

I acknowledge that I have been advised of the effects of my retirement application and am satisfied that all the subjects in this paper have been adequately covered. I have been given the opportunity to ask additional questions or request further information in connection with my retirement.

Date: **John W. Smith, 555-66-7777**

Member Information

Name: (Last, First, Middle Initial)	SSN	Grade	Current Reserve Grade
Smith, John W.	555-66-7777	SSgt	
Unit of Assignment	Place Retirement Desired	Highest Active Duty Grade	
Randolph AFB, TX			
Action Requested	Reserve Status	Extraordinary Heroism Entitlement	
Voluntary Retirement	Current Assignment to Retired Reserve is	<input type="checkbox"/> Established <input type="checkbox"/> Claimed <input checked="" type="checkbox"/> N/A	

I have read AFI 36-3203, para 2.11, 3.2.5, and Chapter 7 and understand the effects of the requested action. I request approval of the actions checked.

Effective Date of Action: Date Applicant Signed:

John W. Smith, 555-66-7777

Next

Figure 6-9. Completed Application

The CSS or commander uses the unit verification IMT to document recommendations and annotate whether the member is subject to any restrictions (**figure 6-10**). Additional information can be obtained via virtual records. After completing the research and making the recommendation, the unit representative submits his or her electronic signature to validate the retirement application, which is then automatically routed to the Decision Authority for approval.



Military Retirement Application ?

U.S. AIR FORCE

Unit Verification

Member is subject to conditions or restrictions as shown in AFI 36-3203, Table 2.1 or Table 2.2

☐ Yes ☒ No

Date: Name, Grade, Title Designated Representative:

Remarks

Research has been completed. Recommend approval of SSgt Smith's retirement.

Virtual Records

Figure 6-10. Unit Recommendation

A higher headquarters (Decision Authority) member receives a task alert indicator (**figure 6-11**).

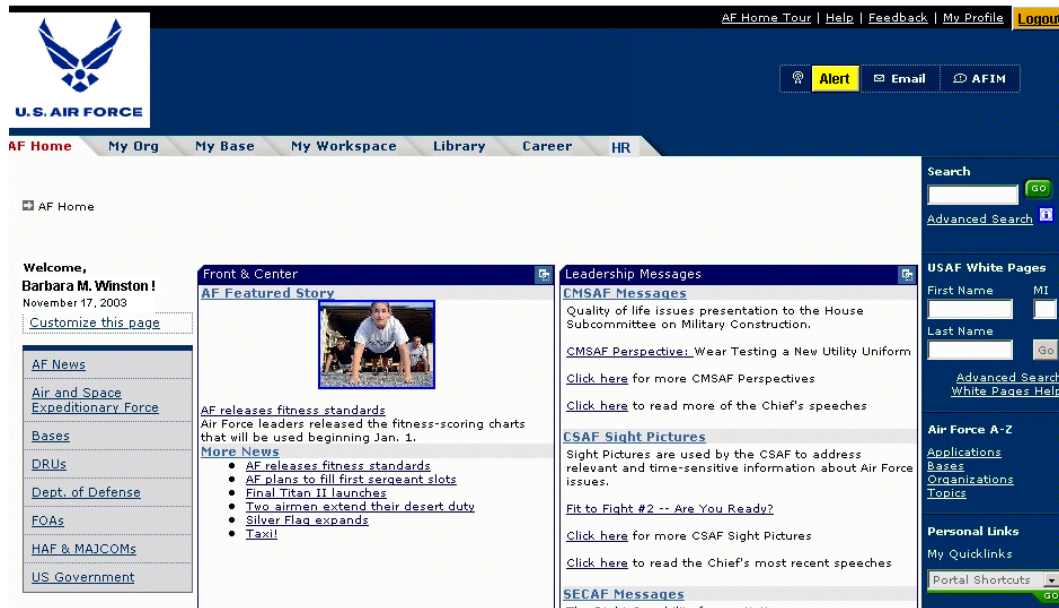


Figure 6-11. Decision Authority Task Alert

The Decision Authority receives a retirement request from an Air Force member (figure 6-12). The task IMT is activated when the task is accessed.

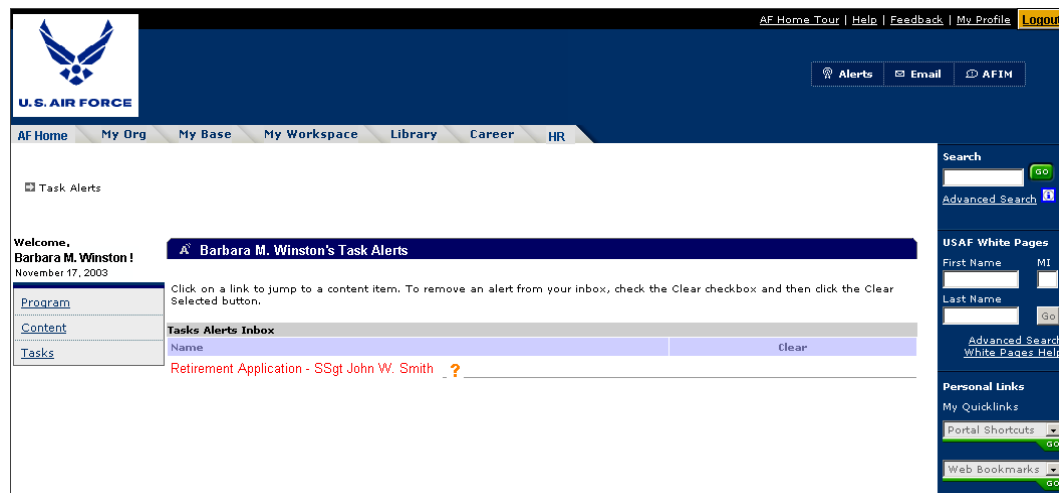


Figure 6-12. Pending Task

The completed retirement application (IMT) is reviewed and the Decision Authority makes note of the requested retirement date (figure 6-13). The IMT continues to the unit's recommendation section.



Military Retirement Application ?

U.S. AIR FORCE

Pre-Application Checklist Verification

I acknowledge that I have been advised of the effects of my retirement application and am satisfied that all the subjects in this paper have been adequately covered. I have been given the opportunity to ask additional questions or request further information in connection with my retirement.

Date: 20031117 **John W. Smith, 555-66-7777**

Member Information

Name: (Last, First, Middle Initial)	SSN	Grade	Current Reserve Grade
Smith, John W.	555-66-7777	SSgt	
Unit of Assignment	Place Retirement Desired	Highest Active Duty Grade	
Randolph AFB, TX			
Action Requested	Reserve Status	Extraordinary Heroism Entitlement	
Voluntary Retirement	Current Assignment to Retired Reserve is	<input type="checkbox"/> Established <input type="checkbox"/> Claimed <input checked="" type="checkbox"/> N/A	

I have read AFI 36-3203, para 2.11, 3.2.5, and Chapter 7 and understand the effects of the requested action. I request approval of the actions checked.

Effective Date of Action: 20040101 Date Applicant Signed: 20031117

John W. Smith, 555-66-7777

Next

Figure 6-13. Retirement Information

The unit's recommendation is reviewed to see if the unit has any information that will assist in making a final decision (**figure 6-14**).



Military Retirement Application ?

U.S. AIR FORCE

Unit Verification Smith, John W. SSgt

Member is subject to conditions or restrictions as shown in AFI 36-3203, Table 2.1 or Table 2.2

☐ Yes ☒ No

Date: 20031117 Name, Grade, Title Designated Representative: Jones, George, Major, Chief CSS **Donald L. Williams, 666-77-5555**


Remarks

Research has been completed. Recommend approval of SSgt Smith's retirement.

Next

Figure 6-14. Unit's Recommendation

Arriving at the HHQ action IMT, the Decision Authority conducts the necessary research to make a final decision (**figure 6-15**). Access to the member's virtual records is available. The retirement request is approved, so the Decision Authority completes the IMT and signs to validate the information. The signature activates system updates and sends out appropriate notifications.



Military Retirement Application ?

HHQ Action

Smith, John W. SSgt

Restrictions:

Documentation
☐ Not Required
☒ Attached

Approved
☒ Yes
☐ No

Remarks

Date:

Name, Grade, Title Designated Representative




Virtual Records

Figure 6-15. Final Decision

Task comments are received stating that the systems have been updated and notifications sent out (**figure 6-16**). The requested date is approved and the retirement order is stored.



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[Task Alerts](#)

Welcome, Barbara M. Winston!
November 17, 2003

[Program](#)
[Content](#)
[Tasks](#)

Barbara M. Winston's Task Alerts

Click on a link to jump to a content item. To remove an alert from your inbox, check the Clear checkbox and then click the Clear Selected button.

Tasks Alerts Inbox		Clear
Name		
Retirement Application - SSgt John W. Smith	HRMS, DFAS updated and notifications sent out. Action closed	Retirement Order

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Figure 6-16. Completed Task

The archived retirement order can be accessed at any time to review or print (**figure 6-17**). When the member receives notification, they will be able to use the orders for out-processing.



DEPARTMENT OF THE AIR FORCE
WASHINGTON

Close

SPECIAL ORDERS
NO. AC-005555

17 NOV 2003

R
SSGT SMITH, JOHN W, 555-66-7777
RANDOLPH AFB TX 781500000

EFFECTIVE 28 DEC 2003 YOU ARE RELIEVED FROM ACTIVE DUTY, ORGANIZATION AND STATION OF ASSIGNMENT,
RETIRED EFFECTIVE 01 JAN 2004 PER AFI 36-3203 IN GRADE OF SSG.

HIGHEST GRADE HELD ON ACTIVE DUTY: SSG

DATE OF BIRTH: 31 AUG 1959

	YEARS	MONTHS	DAYS
SERVICE FOR BASIC PAY:	21	02	05
ACTIVE SERVICE FOR RETIREMENT:	20	07	14
SERVICE PER 10 USC 1405:	20	07	22

PROCEED TO HOME OF SELECTION

PCS. TDN. 5743500 324 5881.9* 525725
(*INSERT M, J, L, R, D, K, H, I, T, G, OR Y).
NONTemporary STORAGE CHARGEABLE TO: 5743500 324 5888. ON 525725.
CIC: 4 5 348 0080 525725. TAC: F38E.

REMARKS: AUTHORITY: AFBCMR BC-2003-02037; DATED 2 OCTOBER 2003
AND SECTION 1552, TITLE 10 USC (70A STAT 116)

BY ORDER OF THE SECRETARY OF THE AIR FORCE

OFFICIAL

Figure 6-17. Retirement Order

The member receives notification that his or her retirement date has been approved (**figure 6-18**). The notification instructs the member to complete the retirement briefing before the actual retirement process can continue.

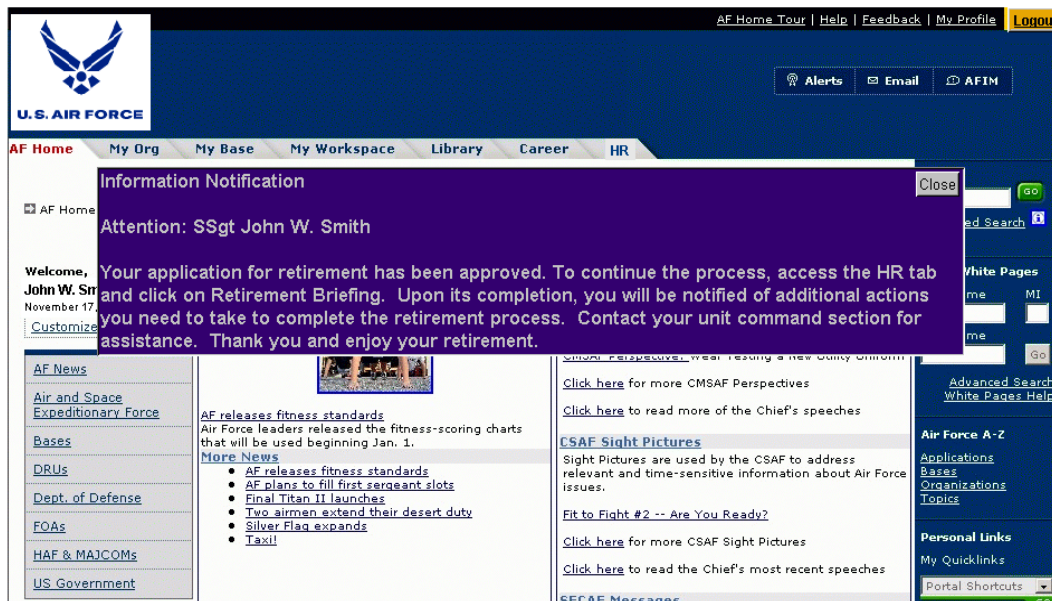


Figure 6-18. Member Notification

The tracking portlet provides information on the request's location during the entire approval process (**figure 6-19**). The member is ready to view the retirement briefing and proceeds to the HR section.

The screenshot shows the U.S. Air Force HR portal. The top navigation bar includes links for AF Home Tour, Help, Feedback, My Profile, and Logout. Below this is a search bar and a navigation menu with options like Alerts, Email, and AFIM. The main content area is divided into several sections: AF Home, Front & Center, Leadership Messages, CMSAF Messages, and a Tracking table. The Tracking table has columns for Action, Office, Date Routed, and How Long. The Front & Center section features an AF Featured Story with a photo of a person and a link to 'AF releases fitness standards'. The Leadership Messages section includes links to CMSAF Messages, CMSAF Perspective, and CSAF Sight Pictures. The CMSAF Messages section contains a link to 'Click here for more CMSAF Perspectives'. The CSAF Sight Pictures section contains a link to 'Click here for more CSAF Sight Pictures'. The CMSAF Perspective section contains a link to 'Click here to read more of the Chief's speeches'. The CSAF Sight Pictures section contains a link to 'Click here to read the Chief's most recent speeches'. The CMSAF Perspective section contains a link to 'Click here for more CMSAF Perspectives'. The CSAF Sight Pictures section contains a link to 'Click here to read the Chief's most recent speeches'. The CMSAF Perspective section contains a link to 'Click here for more CMSAF Perspectives'. The CSAF Sight Pictures section contains a link to 'Click here to read the Chief's most recent speeches'.

Action	Office	Date Routed	How Long
Recommend	CC	20031117	1
Approve	HHQ	20031117	1

Figure 6-19. Tracking

The HR section offers several options (figure 6-20). The member selects the retirement briefing video and sits back to watch.

The screenshot shows the U.S. Air Force HR portal. The top navigation bar includes links for Life Tour, Help, Feedback, My Profile, and Logout. Below this is a search bar and a navigation menu with options like Alerts, Email, and AFIM. The main content area is divided into several sections: HR, Honors and Awards, Evaluations, Contracts, Debts, Retirements, Promotions, and a sidebar with links for Health, Life Matters, Money, and Travel. The HR section contains a link to 'Retirement Briefing - Video'. The Honors and Awards section contains links to 'Time Awards', 'Event Awards', 'Unit Awards', and 'Individual Awards'. The Evaluations section contains links to 'EPR', 'OPR', 'Appeals', and 'Change of Reporting Official'. The Contracts section contains links to 'Specified Period of Time Contract Application', 'Reenlistment Application', 'Terminate Reenlistment Bonus', and 'NPS Enlistment Bonus'. The Debts section contains links to 'Waive/Remission of Indebtedness Application' and 'Remission of Indebtedness Application'. The Retirements section contains links to 'Retirement Application', 'Retirement Briefing - Video', and 'Survivor's Benefit Plan - Video'. The Promotions section contains a link to 'Introduction'.

Figure 6-20. HR Options

The video provides information related to retirement benefits, pay, out-processing hints, etc. (figure 6-21). After completion, the member closes the video, which activates the system to provide the retirement checklist.

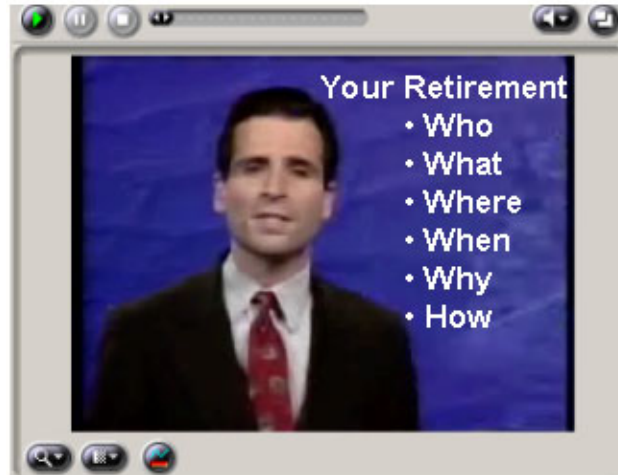


Figure 6-21. Retirement Video

The member receives the retirement checklist and instructions to start the formal retirement process (figure 6-22).

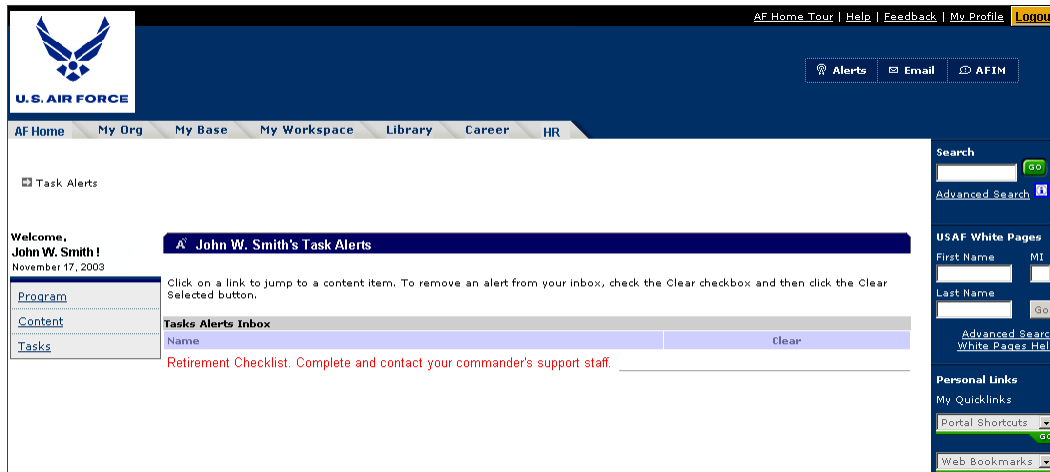


Figure 6-22. Checklist Notification

The member reviews the checklist to determine which offices require out-processing (figure 6-23). The member prints the checklist, as a convenient reminder, and begins out-processing.



U.S. AIR FORCE

Retirement Checklist ?

MEMBER	
<input type="checkbox"/>	Transition Pre-separation Counseling (Family Support Center @ 3-2353)
<input type="checkbox"/>	TMO Clearance. Member must make arrangements through TMO for shipment of household goods.
<input type="checkbox"/>	Base Supply Clearance, 953-5521
<input type="checkbox"/>	Personnel Wireless Communication, Bldg 941, RM A20. (Clear any cell phones, pagers, and hand held radios)
<input type="checkbox"/>	TAP Briefing
<input type="checkbox"/>	Tri-Care (Located at base clinic)
<input type="checkbox"/>	Dental Exam
<input type="checkbox"/>	Retirement Ceremony Plan
<input type="checkbox"/>	Finance
<input type="checkbox"/>	Pre-Separation Counseling (Education Office)
<input type="checkbox"/>	Security Termination
<input type="checkbox"/>	Turn in ID Cards (Members and Dependents)
<input type="checkbox"/>	VA Disability Brief
<input type="checkbox"/>	Survivor Benefit Plan application must be completed prior to your retirement date. This is mandatory and the member's responsibility to complete the SBP. To schedule appointment call Mr. Chuck Young at DSN 493-8472.

[Print Checklist](#) [Previous](#) [Return to MyPortal](#)

Figure 6-23. Retirement Checklist

Each office performs the necessary clearance procedures and electronically clears the member from the out-processing list (**figure 6-24**). This action automatically clears that office from the member's retirement checklist.

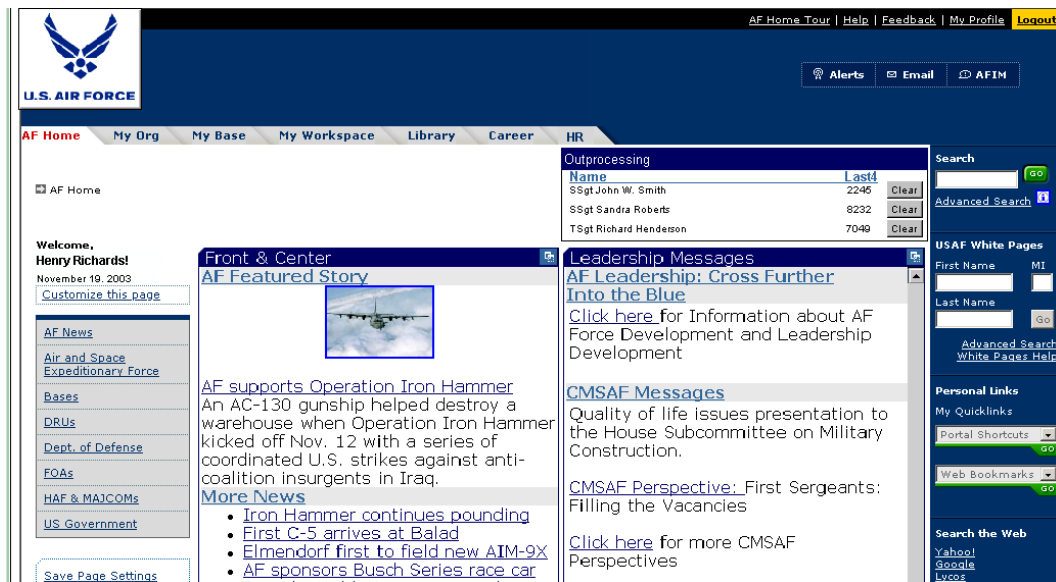


Figure 6-24. Out-Processing List

After the last office is visited, the member logs on to the AF Portal and receives confirmation that the checklist is completed (**figure 6-25**). The member previews the DD Fm 214.

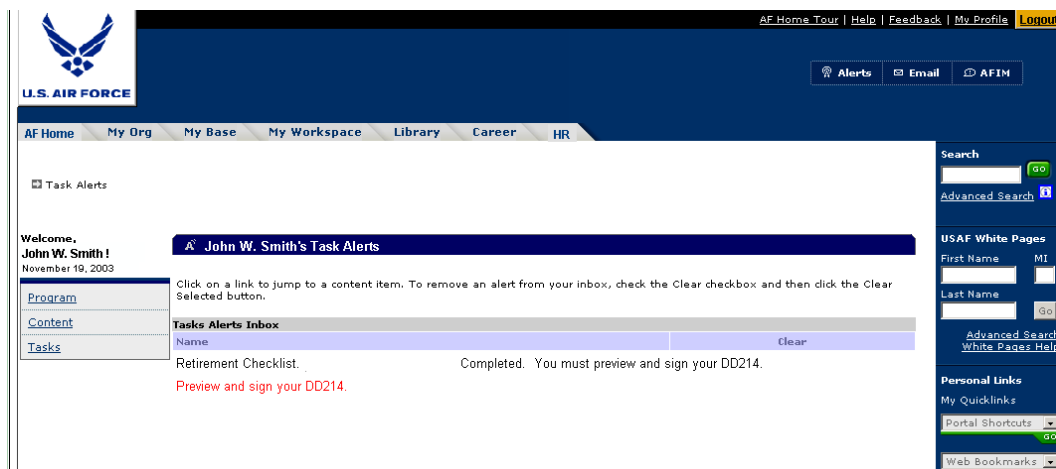


Figure 6-25. Retirement Checklist Completed

The member reviews and electronically signs the DD Fm 214 (**figure 6-26**), which is automatically routed to the Contact Center for review and approval.

CAUTION: NOT TO BE USED FOR IDENTIFICATION PURPOSES		THIS IS AN IMPORTANT RECORD. SAFEGUARD IT.		ANY ALTERATIONS IN SHADED AREAS RENDER FORM VOID	
CERTIFICATE OF RELEASE OR DISCHARGE FROM ACTIVE DUTY					
1. NAME (Last, First, Middle) SMITH, JOHN WILLIAM		2. DEPARTMENT, COMPONENT AND BRANCH AIR FORCE--REG AF		3. SOCIAL SECURITY NO. 555 23 2245	
4. a GRADE, RATE, OR RANK SSgt	4. b PAY GRADE E5	5. DATE OF BIRTH (YYYYMMDD) 19590827		6. RESERVE OBLIG. TERM, DATE Year 2004 Month 01 Day 01	
7. a PLACE OF ENTRY INTO ACTIVE DUTY SAN ANTONIO, TX		7. b HOME OF RECORD AT TIME OF ENTRY (City and state, or complete address if known) 7928 FIGHTER WAY SAN ANTONIO, TX 78292			
8. a LAST DUTY ASSIGNMENT AND MAJOR COMMAND HQ AFPC (RAFB)(AFPC)		8. b STATION WHERE SEPARATED RANDOLPH AFB, TX 78250-3221			
9. COMMAND TO WHICH TRANSFERRED NA		10. SOLI COVERAGE Amount \$250,000.00		<input type="checkbox"/> None	
11. PRIMARY SPECIALTY (List number, title and years and months in specialty. List additional specialty numbers and titles involving periods of one or more years.) 3SD71-ADMINISTRATION TECH-20 YRS 5 MOS /NOTHING FOLLOWS		12. RECORD OF SERVICE			
		a. Date entered AD This Period			
		b. Separation Date This Period			
		c. Net Active Service This Period			
		d. Total Prior Active Service			
		e. Total Prior Inactive Service			
		f. Foreign Service			
		g. Sea Service			
13. DECORATIONS, MEDALS, BADGES, CITATIONS AND CAMPAIGN RIBBONS AWARDED OR AUTHORIZED (All periods of service) AFGCM WW1 OLC; NCO PROF MIL ED RBN; ANTARCTICA SVC MDL; SM ARMS EX PIS/RIFLE; OS SVC LT RBN; OS SVC ST RBN; AF TRAINING RBN; AF LOY SVC RBN. AFOSU AWARD; AF COMM MDL; WW1 OLC /NOTHING FOLLOWS		14. MILITARY EDUCATION (Course title, number of weeks and month and year completed) NCO PREP CRS, 2WKS, MAR 95; BASIC MILITARY TRAINING SCH, 6WKS, SEP 94; ADMINISTRATION TECH CRS, 11WKS, NOV 94; ADMINISTRATIVE SYSTEMS CRS, JAN 95; NCO LEADERSHIP SCH, AUG 95 /NOTHING FOLLOWS			
15. a MEMBER CONTRIBUTED TO POST-VIETNAMERA VETERAN'S EDUCATIONAL ASSISTANCE PROGRAM		15. b HIGH SCHOOL GRADUATE OR ESQUIVALENT		16. DAYS ACCRUED LEAVE PAID NONE	
15. a Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>		15. b Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>			
MEMBER WAS PROVIDED A COMPLETE DENTAL EXAM AND ALL APPROPRIATE DENTAL SERVICES AND TREATMENT WITHIN 90 DAYS PRIOR TO SEPARATION. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
18. REMARKS DATA HEREIN SUBJECT TO COMPUTER MATCHING WITHIN DOD OR WITH OTHER AGENCIES FOR VERIFICATION PURPOSES AND DETERMINING ELIGIBILITY OR COMPLIANCE FOR FEDERAL BENEFITS/MEMBER HAS COMPLETED THREE FULL TERMS OF SERVICE/NOTHING FOLLOWS					
19. a MAILING ADDRESS AFTER SEPARATION (Include Zip Code) 7928 FIGHTER WAY SAN ANTONIO, TX 78292		19. b NEAREST RELATIVE (Name and address - include Zip Code) ELLEN JANINE SMITH 7928 FIGHTER WAY SAN ANTONIO, TX 78292			
MEMBER REQUESTS COPY BE SENT TO TX DIR OF VET. AFFAIRS <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		22. OFFICIAL AUTHORIZED TO SIGN			
21. SIGNATURE OF MEMBER BEING SEPARATED <div style="border: 1px solid black; height: 20px; width: 100%;"></div>		22. OFFICIAL AUTHORIZED TO SIGN <div style="border: 1px solid black; height: 20px; width: 100%;"></div>			
SPECIAL ADDITIONAL INFORMATION (For use by authorized agencies only)					
23. TYPE OF SEPARATION RELEASE FROM ACTIVE DUTY		24. CHARACTER OF SERVICE (Include upgrades) HONORABLE			
25. SEPARATION AUTHORITY AFI36-3203 - Service Retirement		26. SEPARATION CODE MBK		27. REENTRY CODE 1	
28. NARRATIVE REASON FOR SEPARATION COMPLETION OF REQUIRED ACTIVE SERVICE					
29. DATES OF TIME LOST DURING THIS PERIOD NONE				30. MEMBER REQUESTS COPY 4 Initials	

DD Form 214-AUTOMATED, NOV 88 Previous editions are obsolete. MEMBER - 4

Figure 6-26. DD214

A Contact Center HR specialist receives a task alert via MyPortal (figure 6-27).

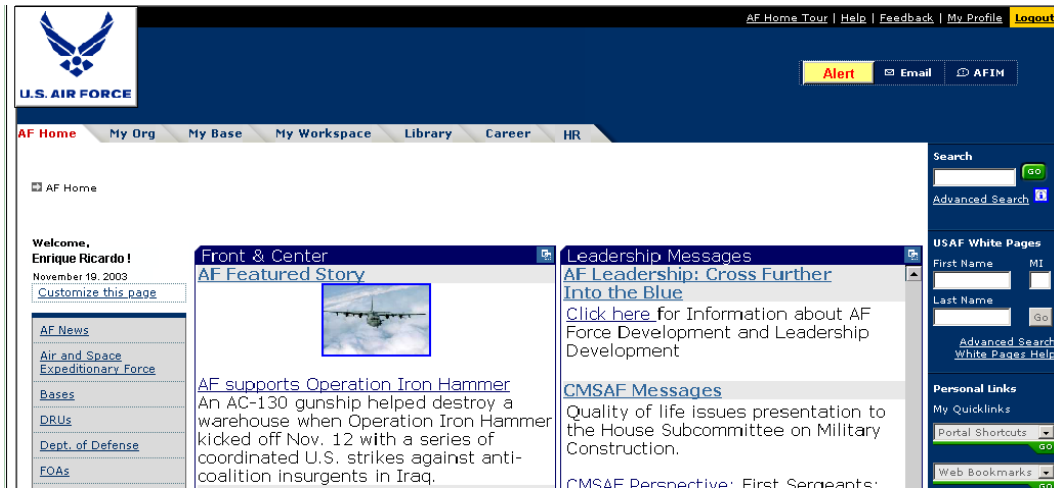


Figure 6-27. HR Specialist's MyPortal

The HR specialist quality checks and approves a DD214 (figure 6-28).

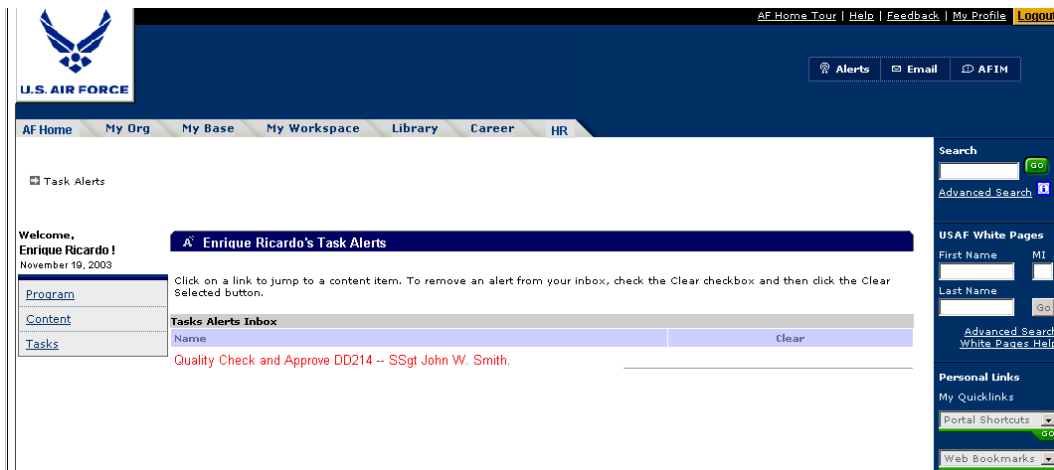


Figure 6-28. HR Specialist's Pending Task

The HR specialist reviews the DD214 to ensure it meets predefined criteria and then electronically signs it (figure 6-29), which activates the archiving of the DD214, updating of HRMS and DFAS systems, and sending out of appropriate notifications.

CAUTION: NOT TO BE USED FOR IDENTIFICATION PURPOSES		THIS IS AN IMPORTANT RECORD. SAFEGUARD IT.		ANY ALTERATIONS IN SHADED AREAS RENDER FORM VOID	
CERTIFICATE OF RELEASE OR DISCHARGE FROM ACTIVE DUTY					
1. NAME (Last, First, Middle) SMITH, JOHN WILLIAM		2. DEPARTMENT, COMPONENT AND BRANCH AIR FORCE-REG AF		3. SOCIAL SECURITY NO. 555 23 2245	
4. a GRADE, RATE, OR RANK SSgt	4. b PAY GRADE E5	5. DATE OF BIRTH (YYYYMMDD) 19590827		6. RESERVE OBLIG. TERM, DATE Year 2004 Month 01 Day 01	
7. a PLACE OF ENTRY INTO ACTIVE DUTY SAN ANTONIO, TX		7. b HOME OF RECORD AT TIME OF ENTRY (City and state, or complete address if known) 7928 FIGHTER WAY SAN ANTONIO, TX 78292			
8. a LAST DUTY ASSIGNMENT AND MAJOR COMMAND HQ AFPC (RAFB) (AFPC)		8. b STATION WHERE SEPARATED RANDOLPH AFB, TX 78250-3221			
9. COMMAND TO WHICH TRANSFERRED NA		10. SOLI COVERAGE <input type="checkbox"/> None Amount \$250,000.00			
11. PRIMARY SPECIALTY (List number, title and years and months in specialty. List additional specialty numbers and titles involving periods of one or more years.) 3S071-ADMINISTRATION TECH-20 YRS 5 MOS /NOTHING FOLLOWS		12. RECORD OF SERVICE			
		a. Date entered AD This Period			
		b. Separation Date This Period			
		c. Net Active Service This Period			
		d. Total Prior Active Service			
		e. Total Prior Inactive Service			
		f. Foreign Service			
		g. Sea Service			
		h. Effective Date of Pay Grade			
13. DECORATIONS, MEDALS, BADGES, CITATIONS AND CAMPAIGN RIBBONS AWARDED OR AUTHORIZED (All periods of service) AFGCM WW1 OLC; NCO PROF MIL ED RBN; ANTARCTICA SVC MDL; SM ARMS EX PIS/RIFLE; OS SVC LT RBN; OS SVC ST RBN; AF TRAINING RBN; AF LOY SVC RBN. AFOSU AWARD; AF COMM MDL; WW1 OLC /NOTHING FOLLOWS					
14. MILITARY EDUCATION (Course title, number of weeks and month and year completed) NCO PREP CRS, 2WKS, MAR 95; BASIC MILITARY TRAINING SCH, 6WKS, SEP 94; ADMINISTRATION TECH CRS, 11WKS, NOV 94; ADMINISTRATIVE SYSTEMS CRS, JAN 95; NCO LEADERSHIP SCH, AUG 98 /NOTHING FOLLOWS					
15. a MEMBER CONTRIBUTED TO POST-VIETNAMERA VETERAN'S EDUCATIONAL ASSISTANCE PROGRAM <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		15. b HIGH SCHOOL GRADUATE OR EQUIVALENT <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		16. DAYS ACCRUED LEAVE PAID NONE	
MEMBER WAS PROVIDED A COMPLETE DENTAL EXAM AND ALL APPROPRIATE DENTAL SERVICES AND TREATMENT WITHIN 90 DAYS PRIOR TO SEPARATION <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
18. REMARKS DATA HEREIN SUBJECT TO COMPUTER MATCHING WITHIN DOD OR WITH OTHER AGENCIES FOR VERIFICATION PURPOSES AND DETERMINING ELIGIBILITY OR COMPLIANCE FOR FEDERAL BENEFITS/MEMBER HAS COMPLETED THREE FULL TERMS OF SERVICE/NOTHING FOLLOWS					
19. a MAILING ADDRESS AFTER SEPARATION (Include Zip Code) 7928 FIGHTER WAY SAN ANTONIO, TX 78292		19. b NEAREST RELATIVE (Name and address - include Zip Code) ELLEN JANINE SMITH 7928 FIGHTER WAY SAN ANTONIO, TX 78292			
MEMBER REQUESTS COPY BE SENT TO TX DIR OF VET. AFFAIRS <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		22. OFFICIAL AUTHORIZED TO SIGN			
21. SIGNATURE OF MEMBER BEING SEPARATED John W. Smith, 555-23-2245		Signature			
SPECIAL ADDITIONAL INFORMATION (For use by authorized agencies only)					
23. TYPE OF SEPARATION RELEASE FROM ACTIVE DUTY		24. CHARACTER OF SERVICE (Include upgrades) HONORABLE			
25. SEPARATION AUTHORITY AFI 36-3203 - Service Retirements		26. SEPARATION CODE MBK		27. REENTRY CODE 1	
28. NARRATIVE REASON FOR SEPARATION COMPLETION OF REQUIRED ACTIVE SERVICE					
29. DATES OF TIME LOST DURING THIS PERIOD NONE				30. MEMBER REQUESTS COPY 4 Initials	

DD Form 214-AUTOMATED, NOV 89 Previous editions are obsolete. MEMBER - 4

Figure 6-29. Quality Check and Approve DD214

The HR specialist receives notification that the task has been completed and all systems updated (figure 6-30).



Figure 6-30. Task Completed

The member receives notification that the DD214 has been approved/archived and retirement payments calculated. The member then must contact his or her unit for ceremony requirements (figure 6-31). The retirement process is completed and “SSgt John Smith” attends a ceremony formalizing his retirement.

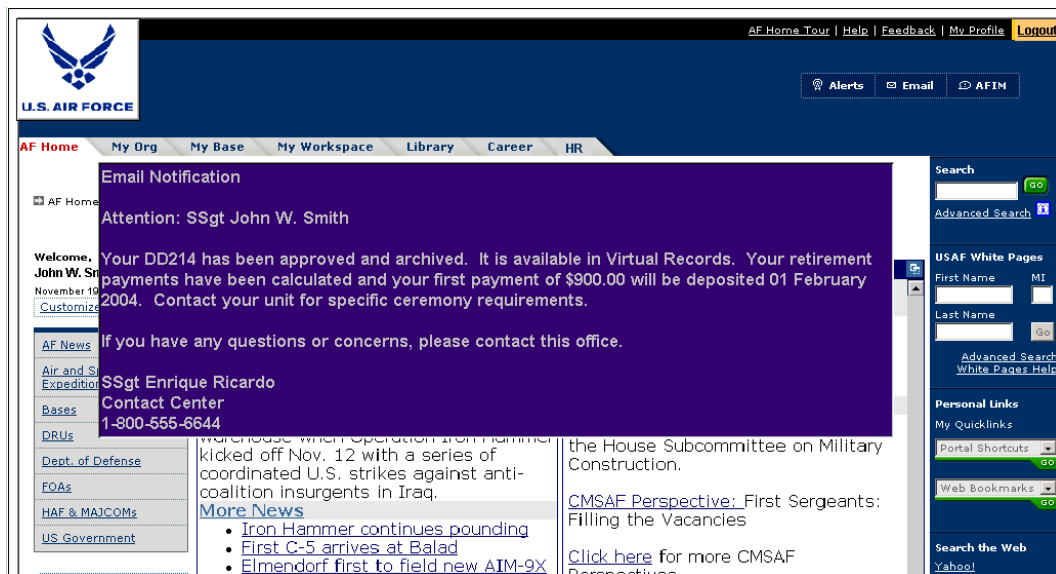


Figure 6-31. Approval Notification

Limitations

- ◆ The current Air Force Portal and/or infrastructure environment will have to be modified because the IMT automation process does not currently interface with existing personnel or finance databases. Until the AF Portal and/or infrastructure environments are modified, the Contact Center or applicable office will have to manually update the system.
- ◆ Retirements-related forms are not yet converted in the IMT format; therefore, they still have to be printed, filled in/signed, and routed manually.

Risks

- ◆ Lack of funding may delay the continued efforts to build upon existing infrastructure, impacting the full retirement’s automation process.

- ◆ Extended downtime could delay the application and routing process, extending the cycle time.

Benefits

- ◆ A fully automated process from the time the member initiates the action until the application/request is completed and the system updated.
- ◆ Drastically reduced cycle time because notifications and routing are made electronically and information can be digitally signed.

6.2 Proof-of-Concept Description for Retirement Action—Civilian

The Benefits and Entitlements Team (BEST) acts as the Contact Center for civilian personnel at bases currently receiving total service from AFPC/DPC (83 bases) and limited services from the Interim Processing Centers (IPC) (13 bases). Counseling services for retirement, death benefits, and answers to questions about current benefits are channeled through BEST team, which currently has 59 employees. BEST's role is to handle personnel questions/problems with using either the interactive voice response system (IVRS) or EBIS.

BEST is the civilian personnel Contact Center for employee benefits and entitlements and is located at the AF Personnel Center at Randolph AFB, Texas (**figure 6-32**).

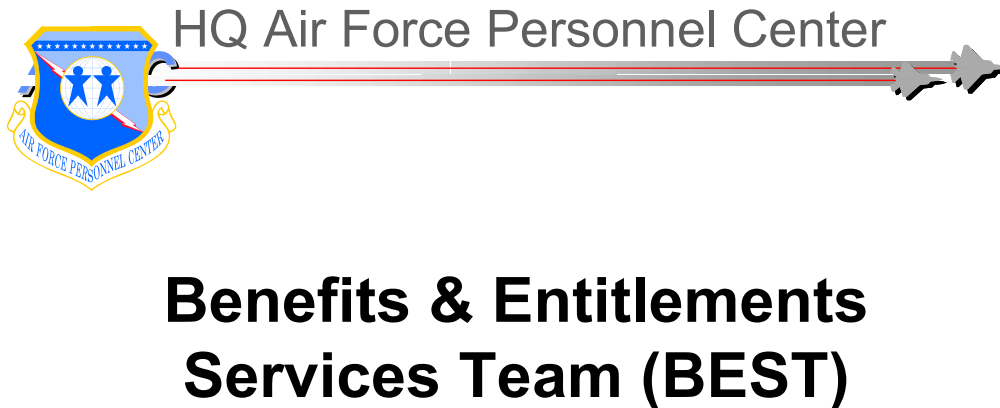


Figure 6-32. Introduction

The limited servicing (**figure 6-33**) includes Thrift Savings Plan (TSP) elections and open season election, Federal Employee's Group Life Insurance (FEGLI) elections and changes, and Federal Employee's Health Benefit (FEHB) elections, changes, and open season transactions.

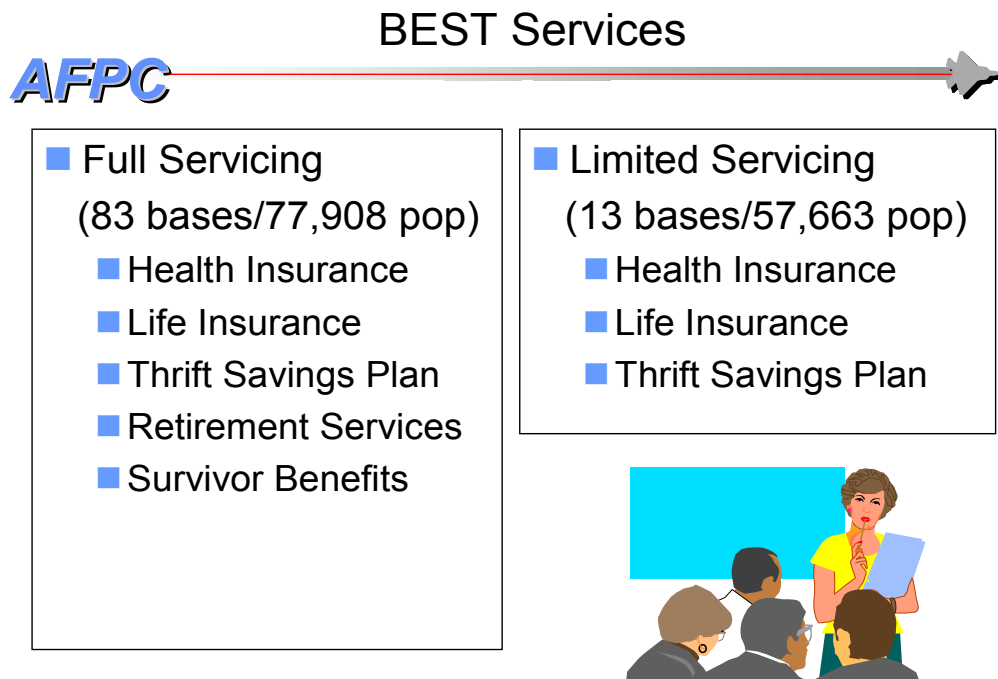


Figure 6-33. Services

The BEST concept of operations (**figure 6-34**) was to reengineer processes to take full advantage of integrated technologies and shift responsibility for benefits programs to the employee, while providing a small group of functional specialists (BEST) to handle unusual cases and questions that could not be answered using these IVRS or EBIS. Using the IVRS system and Web-based EBIS, the employee can accomplish all benefits elections, changes, etc., without ever having to go to the local Civilian Personnel Flight.

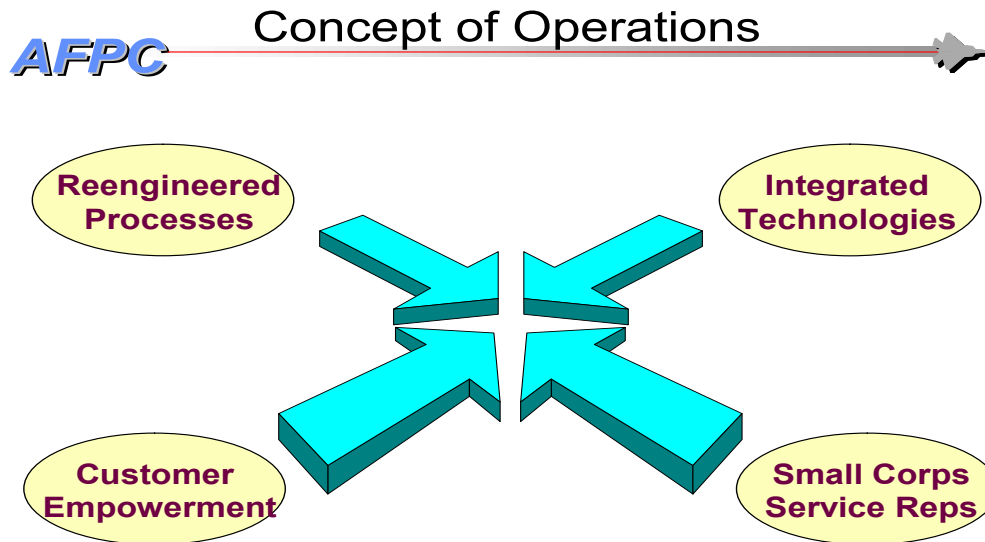


Figure 6-34. Concept of Operations

An employee planning to retire can obtain the forms required to complete the process by going to the BEST homepage (**figure 6-35**). The employee also can go into EBIS or IVRS and obtain a retirement estimate as often as they want and for different scenarios. The estimate is based on data in DCPDS at the time the estimate is requested. An employee can contact a BEST counselor for one-on-one retirement counseling. Once completed, the employee mails forms to the BEST for retirement processing.

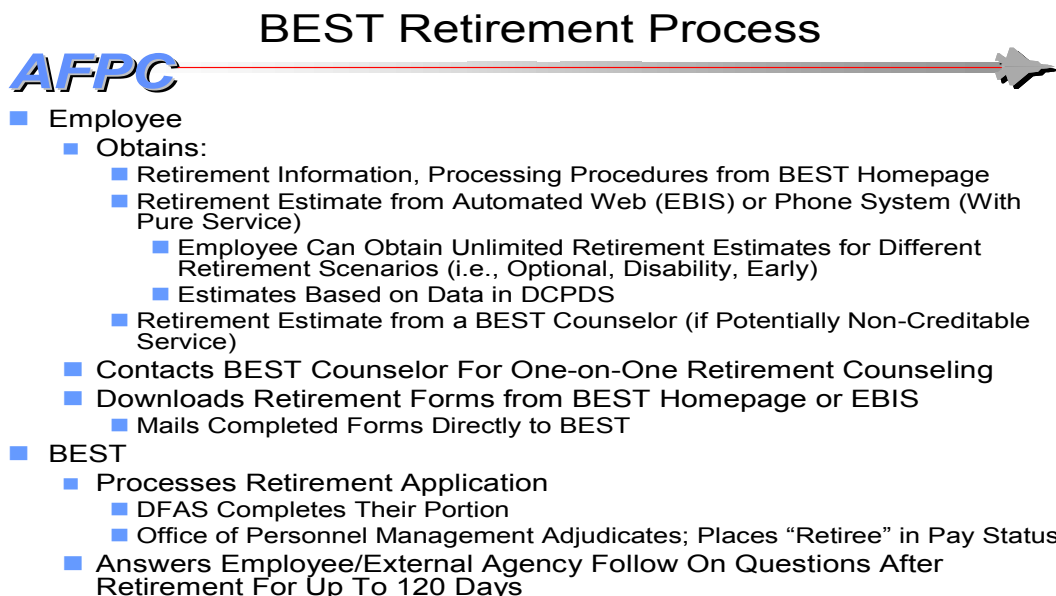


Figure 6-35. Retirement Process

The BEST counselor has all of the employee's benefits information at his or her fingertips (**figure 6-36**). When an employee calls in, the counselor can access that data immediately to give whatever help or information the employee needs.

IVRS - [Benefits Information]

NAME SSAN PAYROLL OFFICE OFCSYM PAS SALARY PHONE

PP: SRS: GR: TG: STEP: TITLE:

HEALTH/LIFE

FEHB PLAN: EFF FEHB DT: CONVERSION: EFFECTIVE DT:

DT ELIG FEHB:

FEHB ELEC EXP:

FEGLI: FEGLI OPT ELIG EXP:

THRIFT SAVINGS

TSP STATUS CD: TSP AGCY CONT ELIG DT: CATCH-UP CONT:

TSP STATUS DT: TSP RTE:

TSP TRANS EFF DT: TSP EMPL AMT:

TSP SCD: TSP EMPL CONT ELIG DT: (RE-ELECT ELIG DT)

RETIREMENT DATA

RET CD: SCD LEAVE: APPT TYPE:

RET MIL DT: SCD RIF: FERS COV:

CRED MIL SVC: SCD CIV: PREV RET CVO:

AGE: WRK SCHED: FROZEN SVC:

DT OF BIRTH: ANN STAT:

FERS ELEC EXP:

PRINT PROJECTED PAY DATA OTHER DATA FEHB FEGLI FORM TSP FORM FEHB PENDING EXIT

Record: 1/1 List of Values

Figure 6-36. Benefits Information

BEST workload averages for the six major retirement areas are shown here (**figure 6-37**). Numbers were averaged for the first 9 months of 2003.

BEST Retirement-Related Workload Activity

- CY03 Numbers (Monthly Average)
 - Retirement Counseling: 527
 - Retirement Estimates (Manual): 319
 - Non-Disability Retirements: 246
 - Disability Retirements: 21
- Employee Deaths: 11
- Family Member Deaths: 10

Figure 6-37. Workload Activity

The following is a demonstration of the BEST Web site (**figure 6-38**), which is accessed from the Air Force Civilian Personnel homepage and is available to all Air Force civilian employees.



HQ Air Force Personnel Center

Demo

Figure 6-38. BEST Demonstration

From the BEST homepage, the employee clicks on the Retiring Employees link to access the Retiring Employees Information Page (**figure 6-39**).

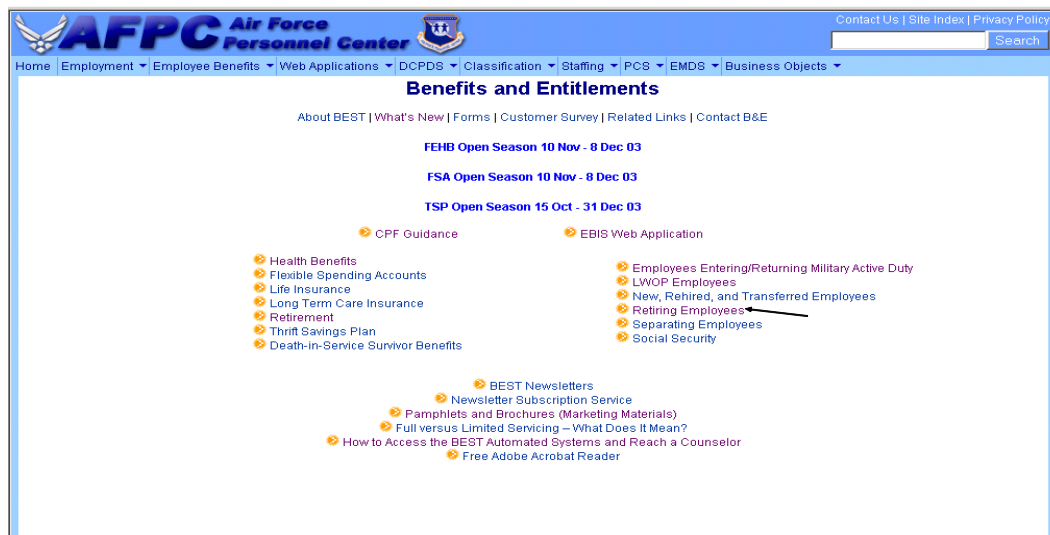


Figure 6-39. Benefits and Entitlements

From the Retiring Employees Information Page, an employee can get information on preparing for retirement and can also download any of the forms they may need to complete a retirement package (**figure 6-40**).

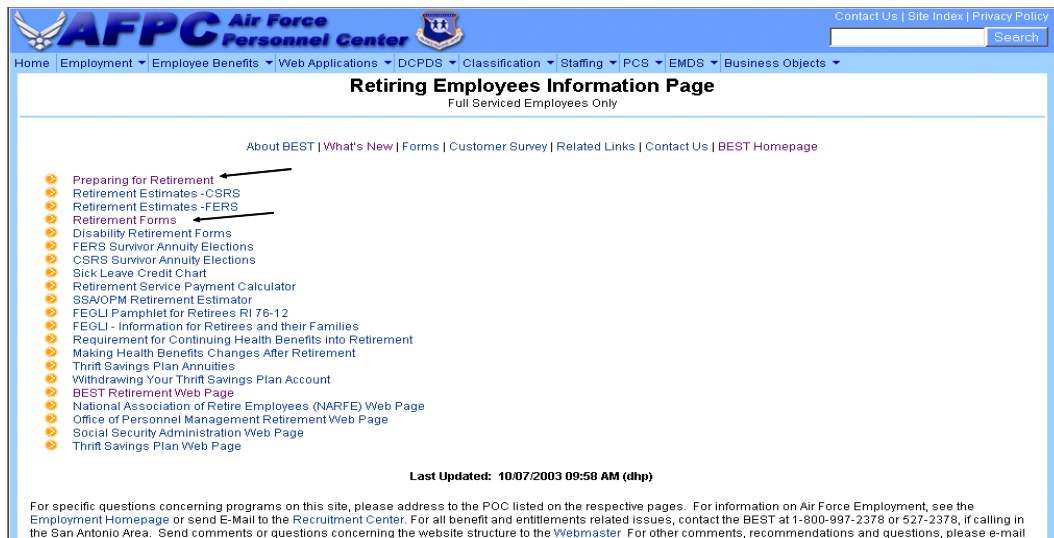


Figure 6-40. Employee Information

The Preparing for Retirement Information Page provides the employee with information on completing the retirement package as well as determining what date to retire and the eligibility requirements for retiring based on the employee's individual retirement plan (**figure 6-41**).

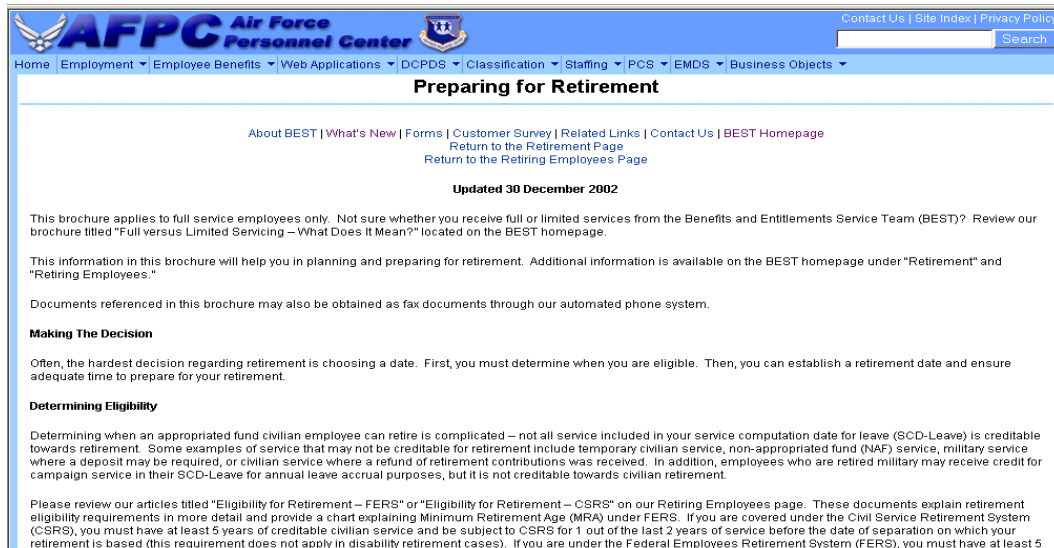


Figure 6-41. Retirement Preparation

The Retirement Forms page provides the employee with all the forms required to complete a retirement package for his or her individual retirement plan (Civil Service Retirement System—CSRS, or Federal Employees Retirement System—FERS) (**figure 6-42**).

AFPC Air Force Personnel Center

Home | Employment | Employee Benefits | Web Applications | DCPDS | Classification | Staffing | PCS | EMDS | Business Objects

Retirement Forms

About BEST | What's New | Forms | Customer Survey | Related Links | Contact Us | BEST Homepage

Updated 30 December 2002

This guidance is for full service employees only. If you receive limited service from the Benefits and Entitlements Service Team (BEST), you must contact your servicing Civilian Personnel Flight (CPF) for all matters related to retirement, including obtaining retirement forms and counseling on the preparation and submission of an application for retirement. If you are not sure whether you receive full or limited services from BEST, visit our [Limited Vs Full Service Page](#).

The forms you will need to complete your retirement package are listed below. Please choose from the list based on your retirement coverage, Civil Service Retirement System (CSRS) or Federal Employees Retirement System (FERS). The forms are in Adobe Acrobat or Microsoft Word format – you should be able to open them if using a government computer. In addition, most of the Adobe Acrobat forms can be filled in while online if you have Adobe Acrobat Reader 4.0 (or higher). If you don't have the Adobe Acrobat Reader, download it free from [Adobe](#).

We encourage you to contact a Benefits Counselor for retirement counseling. The counselor will be happy to answer any questions you have regarding the retirement process or completion of the required forms. To reach a counselor, call 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio, Texas area. Overseas employees will call a toll-free direct access number (obtain from your local CPF). When the phone system answers, press "2" for benefits and entitlements, then "1" for current Air Force-serviced employees, and enter your SSN and PIN at the prompt. On reaching the main menu, press "2" for retirement, then "0" to transfer to a counselor.

Hearing impaired employees may reach a counselor by calling our toll-free TDD line: 1-800-382-0893, or commercial 565-2276 within the San Antonio area, or if overseas, a toll-free direct access TDD number (obtain from CPF). Benefits counselors are available Monday - Friday from 7 a.m. - 6 p.m. Central Standard Time.

CSRS RETIREMENT FORMS	FERS RETIREMENT FORMS
SF 2601, Application for Immediate Retirement (includes Schedules A, B, and C)	SF 3107, Application for Retirement (includes Schedules A, B, and C)
Instructions are included with the form.	Instructions are included with the form.
SF 2601-2, Spouse's Consent to Survivor Election, if	SF 3107-2, Spouse's Consent to Survivor Election, if

Figure 6-42. Retirement Forms

The EBIS is available only to current Air Force Employees and is accessed through AFPC Secure. EBIS can provide the employee with current benefits information, calculators, and information on these programs (**figure 6-43**).

DEPARTMENT OF AIR FORCE

EBIS EMPLOYEE BENEFITS INFORMATION SYSTEM

Help | My Benefits | Calculators | Transactions | Forms | My Profile | Information

Welcome to the Employee Benefits Information System (EBIS)...

Department of Air Force

The Employee Information Benefits System (EBIS) is designed to provide Federal employees general and personal information regarding their benefits and includes capabilities for executing benefit transactions using a Web browser.

To get started - choose one of the following:

- My Benefits**: Click for a comprehensive personal statement of your benefits.
- Calculators**: Click to perform a variety of "what-if" calculations.
- Transactions**: Click to view current coverage and/or change your TSP, FEHB, or FEGLI benefits.
- Forms**: Click to fill and/or print forms.
- My Profile**: Click to personalize your information that can be used in EBIS.
- Information**: Click to view information about Federal employee benefits.

Session
User: []

Last Login:
Date: 11/20/2003
Time: 03:39:39 PM

PIN [] Logout []

Pending Transactions

FEHB:	None
TSP:	None
TSP Catch-Up:	None
FEGLI:	None

Agency News

FEHB Open Season 10
Nov thru 8 Dec 03. TSP
Open Season 15 Oct thru
31 Dec 03. Click on the
Transactions button.

Figure 6-43. EBIS Welcome Page

Once an employee has logged on to EBIS and has selected the My Benefits button, the employee is shown a series of tabs that give current information on these areas. The Retirement tab will provide an annuity estimate that lists several scenarios (**figure 6-44**).

DEPARTMENT OF AIR FORCE
EBIS EMPLOYEE BENEFITS INFORMATION SYSTEM

Help **My Benefits** **Calculators** **Transactions** **Forms** **My Profile** **Information**

Session
User: _____

Last Login:
Date: 11/20/2003
Time: 03:39:39 PM

PIN **Logout**

Pending Transactions
FEHB: None
TSP: None
TSP Catch-Up: None
FGLI: None

Agency News
FEHB Open Season 10
Nov thru 8 Dec 03. TSP
Open Season 15 Oct thru
31 Dec 03. Click on the
Transactions button.

My Personal Statement of Benefits

Printer Friendly Version

Personal Retirement Insurance Social Security TSP Death and Disability Other

Retirement Benefits

All retirement benefit estimates assume you have no outstanding deposits, redeposits, or military service deposits. Each Assumed High-3 Average Salary is a percentage of your Annual Basic Pay amount. The percentage of your Annual Basic Pay used ranges from 94% to 100%, depending on the length of time between the assumed effective date of your Annual Basic Pay rate and the assumed Annuity Starting Date. Your Annual Basic Pay rate is assumed to have taken effect the first full pay period in January of the current year. When applicable, your sick leave balance was also used in computing your estimated retirement benefits. If you have had ANY part-time service, your retirement benefit estimates may be overstated.

At time of retirement, you may elect to provide a survivor annuity for your spouse. The survivor annuity would be paid in the event you died before your spouse. Two estimated monthly annuities are shown for each Annuity Starting Date. One assumes you elected no survivor benefit and the other assumes you elected the maximum survivor benefit. Under CSRS and the CSRS Offset plan, the Maximum Survivor Annuity is equal to 55 percent of your full monthly annuity. Under FERS, the Maximum Survivor Annuity is equal to 50 percent of your full monthly annuity.

If you are covered under the CSRS Offset Plan, your annuity may be reduced or "offset" beginning at age 62. Please refer to the Social Security tab for detailed information on the amount of the offset.

VOLUNTARY / OPTIONAL RETIREMENT BENEFITS

Annuity Starting Date	Age (Yrs/Mos)	Assumed High-3 Average Salary	Monthly Annuity (No Survivor Benefits)	Monthly Annuity (Maximum Survivor Benefits)	Maximum Monthly Survivor Annuity	Monthly FERS Annuity Supplement
08/17/2008	62/0	\$60,227.00	\$941.05	\$846.94	\$470.00	N/A

Figure 6-44. Personal Statement of Benefits

By selecting the Calculator button, the employee can provide some basic information and then get an estimate for as many scenarios as they wish, as often as they wish (figure 6-45).

DEPARTMENT OF AIR FORCE
EBIS EMPLOYEE BENEFITS INFORMATION SYSTEM

Help **My Benefits** **Calculators** **Transactions** **Forms** **My Profile** **Information**

Session
User: _____

Last Login:
Date: 11/20/2003
Time: 03:39:39 PM

PIN **Logout**

Pending Transactions
FEHB: None
TSP: None
TSP Catch-Up: None
FGLI: None

Agency News
FEHB Open Season 10
Nov thru 8 Dec 03. TSP
Open Season 15 Oct thru
31 Dec 03. Click on the
Transactions button.

Calculators : Retirement Estimate

Select Type of Benefit

☒ Optional Retirement
 ☐ Disability Retirement
 ☐ FERS MRA+10 Retirement
☐ Early Retirement
 ☐ Death-in-Service Survivor Benefits
 ☐ FERS Reduced Deferred Retirement
☐ Deferred Retirement
 ☐ Discontinued Service Retirement
 ☐ FERS Postponed Retirement

Next >>

If a printed copy of the estimate is incomplete, select File on the toolbar, then Page Setup, and change the Orientation to Landscape. The retirement calculator produces a very reliable estimate based on data from your personnel records and certain system assumptions. The system

Figure 6-45. Retirement Estimate

Results of the information provided in previous screen produces the estimate for the employee (figure 6-46).

DEPARTMENT OF AIR FORCE
EBIS EMPLOYEE BENEFITS INFORMATION SYSTEM

Help **My Benefits** **Calculators** **Transactions** **Forms** **My Profile** **Information**

Session
 User:
 Last Login: Date: 11/20/2003 Time: 03:39:39 PM
 PIN Logout

Pending Transactions
 FEHB: None
 TSP: None
 TSP Catch-Up: None
 FEGLI: None

Agency News
 FEHB Open Season 10 Nov thru 8 Dec 03. TSP Open Season 15 Oct thru 31 Dec 03. Click on the Transactions button.

Calculators : Retirement Estimate

Annuity Estimate Calculation Results

Basis
 Name:
 Date of Birth:
 Service Computation Date for Retirement (SCD):
 Type of Estimate:
 Date of Retirement: 08/17/2008
 Annuity Begin Date (deferred and postponed retirements): N/A
 Retirement System: FERS
 Annual Basic Pay (includes locality pay): \$60,227.00
 Assumed High-3 Average Salary: \$60,227.00
 Sick Leave Balance: 0.00 Hrs.

Summary
 Monthly Annuity Without Survivor Benefits: \$941.05
 Monthly Annuity With Maximum Survivor Benefits: \$846.94
 Monthly Survivor Annuity: \$470.00

If a printed copy of the estimate is incomplete, select File on the toolbar, then Page Setup, and change the Orientation to Landscape. The retirement calculator produces a very reliable estimate based on data from your personnel records and certain system assumptions. The system

Figure 6-46. Calculation Results

By selecting the Forms button, the employee can download the form or fill it in online and then print it (figure 6-47).

DEPARTMENT OF AIR FORCE
EBIS EMPLOYEE BENEFITS INFORMATION SYSTEM

Help **My Benefits** **Calculators** **Transactions** **Forms** **My Profile** **Information**

Session
 User:
 Last Login: Date: 11/20/2003 Time: 03:39:39 PM
 PIN Logout

Pending Transactions
 FEHB: None
 TSP: None
 TSP Catch-Up: None
 FEGLI: None

Agency News
 FEHB Open Season 10 Nov thru 8 Dec 03. TSP Open Season 15 Oct thru 31 Dec 03. Click on the Transactions button.

Forms

Retirement Related Forms
 SF2809 - Health Benefits Elections Form
 SF2818 - Continuation of Life Insurance Coverage
 SF2823 - Life Insurance Designation of Beneficiary
 SF3102 - Designation of Beneficiary
 SF3106 - Refund Application
 SF3107 - Application for Immediate Retirement FERS
 SF3107 Schedule D - Agency Check List of Immediate Retirement Procedures
 SF3107 Schedules A,B,C - A- Military Service Information, B- Military Retired Pay, C- Federal Empl.

Create

As a convenience to you, this page was designed to assist you in completing retirement forms. You may do this several different ways - you may complete them on line, then print; you may print the forms and fill them out manually; or you may download and save the forms to your desk

Figure 6-47. Related Forms

The Application for Immediate Retirement is an example of a retirement form available on the Forms page (figure 6-48).

FEHB
Federal Employees Health Benefits Program

HEALTH BENEFITS REGISTRATION FORM
Federal Employees Health Benefits Program

Form Approved:
OMB No. 3206-0160

• Complete Part A and Parts B, C, D, and E as applicable. • Do not separate the copies. Your employing office will certify the completed form and return your copy to you. • Type or Print Firmly. • Sign and date in Part F.

PART A - Fill in this part.

1. Name of plan: **SCHERTZ IX 78154**

2. Date of birth (mo., day, yr.): **8/18/46**

3. Sex: ☐ Male ☒ Female

4. Are you now married? ☒ Yes ☐ No

5. Daytime telephone number: **(210) 652-2557**

PART B - Fill in this part if you wish to enroll or change your enrollment in the Federal Employees Health Benefits (FEHB) Program.

1. I elect to enroll in a health benefits plan as shown below. (Copy the information requested below from front cover of brochure of the plan you select.)

Name of plan	2b. ZIP code	2c. Date of birth (mo., day, yr.)	2d. Sex	2e. Relationship "code"	2f. Social Security number (See Instructions)
EOPF Scanned Form		/ /			
		/ /			
		/ /			
		/ /			
		/ /			

3a. Do you, your spouse or any other eligible family members have any group health insurance coverage other than the FEHB plan in which you are now enrolling or enrolled? ☐ No ☐ Yes → Complete 3b

3b. Type of insurance: ☒ Medicare ☐ CHAMPUS ☐ Other private (specify name)

Figure 6-50. Health Benefits Election Form

Limitations

- Currently, the system does not allow electronic submission of the retirement application. The employee must print it and mail it to the BEST at AFPC/DPCM.

Risks

- None have been identified. Security procedures already are in place through AFPC Secure for current employees who access any of the Civilian Personnel Systems.

Benefits

- With full electronic submission, the employee can submit his or her retirement application from any location to the BEST office at AFPC/DPCM.
- Allows for filing into PARIS without scanning first. Files would be stored in an electronic format instead of images as they are now.

6.3 Proof-of-Concept Description for Disability Retirement Action by PeopleSoft

The purpose of this demonstration was to show the functionality of COTS software in recording the request and/or offer of an accommodation to allow a person with a disability to continue working rather than going on TDRL Retirement. These pages allow for the recording of the disability, the accommodation(s) proposed, the anticipated cost, and the job code and job tasks being impacted. An HR specialist would access the data, which are not available through self-service.

Navigation Path in PeopleSoft:

Workforce Administration→Personal Information→Disability→Disabilities→EmplID

The Disability page (**figure 6-51**) records the initial status of disability at the member/employee level.

The screenshot shows the PeopleSoft interface for the 'Disability' page. The header includes the PeopleSoft logo and navigation links: Home, Worklist, Add to Favorites, Sign out, New Window, and Help. Below the header, there are tabs for 'Disability', 'Accomm Request', 'Accomm Option', and 'Accomm Job Task'. The main content area displays the employee's name 'Rickman, Laurie B', their role 'Employee', and 'EmplID: 223454219'. A 'Disabled' checkbox is checked, and a dropdown menu shows 'USA'. At the bottom, there are several action buttons: Save, Return to Search, Next in List, Previous in List, Notify, Previous tab, Next tab, Update/Display, Include History, and Correct History. A breadcrumb trail at the very bottom reads: Disability | Accom Request | Accom Option | Accom Job Task.

Figure 6-51. Disability

The Accommodation Request page (**figure 6-52**) records accommodations requested, the status of the accommodation, the nature of the disability, and displays information from the member/employee's current job record, allowing for free-text comments.

The screenshot shows the PeopleSoft interface for the 'Accommodation Request' page. The header and navigation tabs are the same as in Figure 6-51. The main content area displays the employee's name 'Rickman, Laurie B', their role 'Employee', and 'EmplID: 223454219'. Below this, there is a 'Request Details' section with fields for 'Accommodation ID' (1), 'Date of Request' (12/15/2012), 'Business Unit' (USAF1), 'Department' (LE1CFS95), 'Job Code' (52R1A), and 'Location Code' (FD1SFJNT). A 'Comment' field is also present. The 'Responsible ID' is 226489715, and the 'Request Status' is 'Pending'. Below the request details, there is a table for 'Disability' with columns for 'Regulatory Region', 'Diagnosis Code', and 'Description'. The table contains one row: 1 USA, 001, Confined to Wheelchair. At the bottom, there are action buttons: Save, Return to Search, Notify, Previous tab, Next tab, Update/Display, Include History, and Correct History. A breadcrumb trail at the very bottom reads: Disability | Accom Request | Accom Option | Accom Job Task.

Figure 6-52. Accommodation Request

The Accommodation Option page (**figure 6-53**) lists the type of accommodation requested or offered, allows for more than one option, allows for estimated cost of accommodation, and can contain free-text comments. It also records the status and status date of the accommodation.

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#)

Disability | **Accomm Request** | **Accomm Option** | Accom Job Task

Rickman, Laurie B Employee EmpID: 223454219

Option Details Find | View All First 1 of 1 Last

Accommodation ID: 1 Date of Request: 12/15/2012

Business Unit: USAF1 US Air Force Share - BU

Department: LE1CFS95 OL SC00 AIR COMBAT COMMAND CM

Job Code: 52R1A CHAPLAIN, PROTESTANT

Location Code: FD1SFJNT 50 OPERATIONS GP

Accommodations/Alternatives Find | View All First 1 of 1 Last

*Option ID: 1 ☒ Employer Suggested Option *Currency Code: USD

*Type: RAMP Wheelchair Ramp Cost: 0.00

Description

*Accommodation Status: Offered *Status Date: 12/15/2001

Save Return to Search Notify Previous tab Next tab Update/Display Include History Correct History

Disability | Accom Request | **Accomm Option** | Accom Job Task

Figure 6-53. Accommodation Option

The Accommodation Job Task page (figure 6-54) displays current job data for the member/employee, and allows for the recording of specific job codes and job tasks being accommodated.

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#)

Disability | Accom Request | Accom Option | **Accomm Job Task**

Rickman, Laurie B Employee EmpID: 223454219

Job Details Find | View All First 1 of 1 Last

Accommodation ID: 1 Date of Request: 12/15/2002

Business Unit: USAF1 US Air Force Share - BU

Department: LE1CFS95 OL SC00 AIR COMBAT COMMAND CM

Job Code: 52R1A CHAPLAIN, PROTESTANT

Location Code: FD1SFJNT 50 OPERATIONS GP

Job Task Accommodated Find | View All First 1 of 1 Last

Business Unit: USAF1 US Air Force Share - BU

Job Code: 52R1A CHAPLAIN, PROTESTANT

Location: FD1SFJNT 50 OPERATIONS GP

Job Task: 0001 Preparing Sermons

Save Return to Search Notify Previous tab Next tab Update/Display Include History Correct History

Disability | Accom Request | Accom Option | **Accomm Job Task**

Figure 6-54. Accommodation Job Task

Limitations

- ◆ None identified.

Risks

- ◆ Inadequate security profiles could allow sensitive personal information to be viewed by non-authorized persons.
- ◆ Documentation of disability accommodations predating the system implementation would not be available in system unless an electronic format of past requests is available at conversion.

Benefits

- ◆ Allows for the recording of accommodation requests and/or offers in an electronic record form. The system allows for more than one option to be considered, and archives the record.
- ◆ Security profiles within the software could limit access of this sensitive information to those with a need to know.

6.4 Proof-of-Concept Description for Person Checklist by PeopleSoft

The purpose of this demonstration was to show the system capability to create and maintain checklists for individual employee actions. The items are configurable for each type of action being documented. A new feature with the version of PeopleSoft is the inclusion of dynamic links which, when clicked on, jump to the specific pages within the software that are to be updated.

Navigation Path in PeopleSoft:

Workforce Administration → Personal Information → Person Checklist → EmplID

The employee checklist allows for recording the status of predetermined items to be completed for a specific business process – in this instance, for an Air Force Retirement (**figure 6-55**).

PeopleSoft. Home | Worklist | Add to Favorites | Sign out

New Window | Help

Employee Checklist

Miller, John L. Employee EmplID: JAM003EMP Empl Rcd#: 0

Employee Checklist Find | View All First 1 of 1 Last

Checklist Date: 11/10/2003 Checklist: AFRET AF Retirement

Responsible ID: Comment:

Sequence	Checklist Item Code	Description	Briefing Status	Link ID
1	100	AF001 Relocation Package	Initiated	
2	200	AF004 Update Job Data	Initiated	Update Job with Termination Dt
3	300	AF005 Retirement Pay Estimate	Initiated	http://www.afpc.randolph.af.mil
4	400	AF002 Brief member	Initiated	
5	500	AF007 Notify Security	Initiated	
6	600	AF008 Check in all USAF Equipment	Initiated	
7	700	AF006 Retirement Ceremony	Initiated	

Save Return to Search Next in List Previous in List Notify

Figure 6-55. Employee Checklist

The dynamic link from the checklist page jumps the user directly to job data for insertion of a retirement row and the separation date (**figure 6-56**).

PeopleSoft. Home | Worklist | Add to Favorites | Sign out

New Window | Help

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Miller, John L. Employee EmplID: JAM003EMP Empl Rcd#: 0

Job Information Find First 1 of 2 Last

Effective Date: 12/31/2003 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Retirement Normal Retirement Future

Job Code: 11F3F FIGHTER PILOT, F-15 Entry Date: 01/01/2003

Supervisor Level: Supervisor Level: Planned Exit: 123103 End Job Automatically

Regular/Temporary: Regular Full/Part: Full-Time

Empl Class: Empl Class: Officer Code: None

Regular Shift: N/A Shift Rate: FTE: 1.000000

Standard Hours: 56.00

Work Period: W Weekly

Contract Number: Contract Type:

Next Contract Number

USA

FLSA Status: No FLSA EEO Class: None Work Day Hours:

Job Data Employment Data Earnings Distribution Benefits Program Participation

Figure 6-56. Job Data Pages Accessed by Dynamic Link on Checklist

The Retirement Estimate Form allows the HR specialist to calculate a member's estimated retirement income (figure 6-57).

The screenshot shows the AFPC (Air Force Personnel Center) Retirement Estimate Form. The header includes the AFPC logo and navigation links like 'Menu', 'External Links', 'Contact Us', 'Site Index', and 'Privacy Policy'. The main title is 'Retirement Estimate Form'. A note explains that the calculator provides an estimate based on 01/01/2003 pay scales and is for informational purposes only. Below the note are instructions for entering data in YYMMDD format and a 'To Print' instruction. The form itself is a separate window titled 'Retirement Estimate Form' with a 'Help' button. It contains input fields for: Last Name, Rank (a dropdown menu showing 'O1 - 2nd Lieutenant'), Pay Date, 1405 Date, DIEMS Date, TAFMS Date, Effective Date of Rank, Projected Retirement Date (with an example '1 Oct 2001 = 011001'), and TAFCS Date (Officers Only). At the bottom are 'Do Estimate' and 'Clear' buttons.

Figure 6-57. Retirement Estimate Form

Limitations

- ◆ Dynamic links not available to Web sites outside of PeopleSoft environment.
- ◆ As delivered, employee self-service access is not available to checklists; this could be a modification consideration.

Risks

- ◆ None identified.

Benefits

- ◆ Ability to track required steps throughout a process in-system.
- ◆ Use of dynamic links makes navigation to another area of the software automatic.
- ◆ Ability of multiple authorized users to view the progress of the event by accessing the checklist.
- ◆ Multiple checklists are available for any one person at any time, depending on HR activity being tracked.

6.5 Proof-of-Concept Description for Retirement Action by Oracle

Oracle provides a straightforward approach to retiring a person. The system treats retirement and termination the same way, using reason codes to reflect the purpose of ending the employment.

The HR specialist enters the termination reason. He or she can define valid reasons as values for the Lookup Type LEAV_REAS.

Note: When the HR specialist enters the termination reason of “deceased” and an actual termination date, an employee’s date of death is set to the actual termination date if it has not been entered in the Other Information tab of the People window.

Note: If the employee is retiring the HR specialist must select the Retirement reason. This automatically creates a retiree personnel record that can be used by the benefits department to trigger payments such as pensions.

Enter the termination dates. Only the Actual date is required. The Notified and Projected dates are for information only. The Final Process date is the date after which no further pay processing for the employee can occur, if the HR specialist is using Oracle Payroll.

Note: For the Final Process date: If the HR specialist needs to process pay for the employee after his or her termination, he or she should set the Final Process date later than the Actual date, or leave it blank. If the HR specialist does not need to continue processing, he or she should set the Final Process date to the Actual date.

Note: If the HR specialist is using Oracle Payroll, he or she also must enter a Last Standard Process date. This is the last date for normal processing; the Final Process date is the last date for late payments. Element entries are closed down on the Last Standard Process date, the Actual date, or Final Process date, depending on how the HR specialist has defined the elements.

The HR specialist selects a terminated user person type in the Type field.

Note: The Type field is only enabled when the Actual date is entered for the first time. When the HR specialist enables the Type field it is populated by the default value for the Ex-Employee system person type. The person type selected is assigned to the person’s record following termination. The person type is displayed as the Actual date plus 1 day.

The HR specialist selects a terminated assignment status in the Status field.

Note: The Status field is only enabled when the Actual date is entered – the Final Process has not been entered, or the Final Process date has been entered but is different than the Actual date. When the HR specialist enables the Status field it is populated by a default value.

Note: The terminated assignment status that the HR specialist selects is used for the primary assignment. This assignment status is displayed as the Actual date plus 1 day. If the HR specialist updates the primary assignment status, the termination window still will display the status as the Actual date plus 1 day.

When the information is complete, the HR specialist chooses the Terminate button to complete the termination.

The user logs on to the Oracle Portal and chooses an employee action (**figure 6-58**). Under Favorites, the user chooses Manager Action.

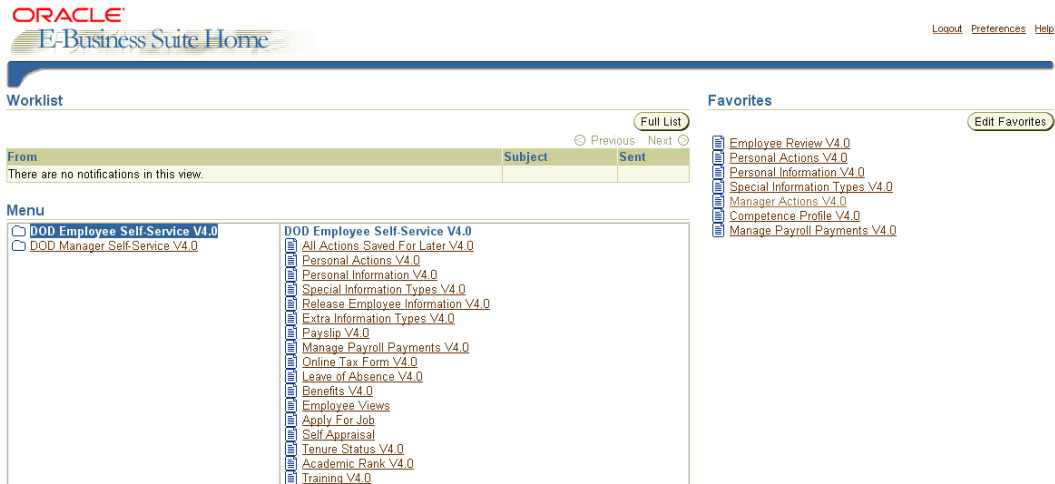


Figure 6-58. Retirement Action

Commander or supervisor (manager) clicks on the employee name to perform the retirement action (**figure 6-59**). The manager recognizes that the employee has personal reporting options.

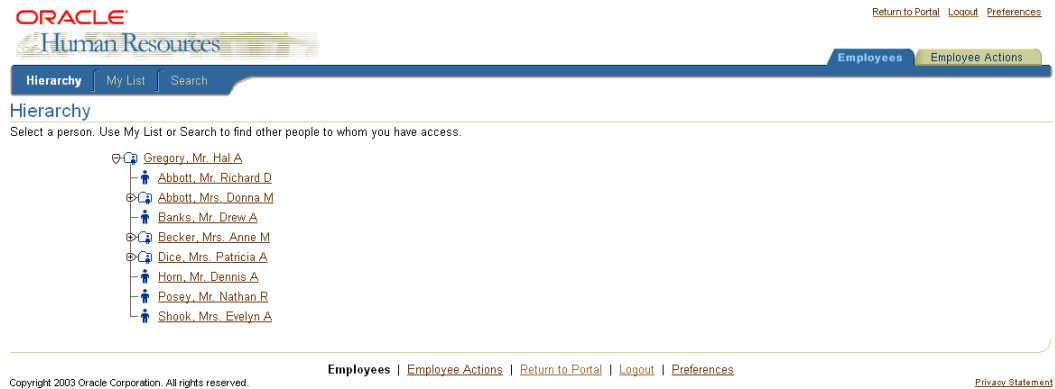


Figure 6-59. Employee List

The manager chooses option "Termination v4.0" (**figure 6-60**), then chooses the effective date of the termination action and clicks the Start button.

ORACLE® Human Resources Return to Portal L

Employees Empl

Employees : [Hierarchy](#) > Employee Actions

Selected Employee **Abbott, Mrs. Donna M** Effective Date **20-Nov-2003**
 Employee Number **45** (example: 31-Dec-2000)
 Manager Name **Gregory, Mr. Hal A** Department **313th Military Intel**
 Job **11011.Commanding**

Perform Employee Action

Actions Saved for Later

Select a saved action, verify the Effective Date and click Complete to finish an action, or click Delete to remove a saved action.

Select Action	Department	Job	Status	Start Date	*Effective Date	Notes
No data exists.						

Available Actions

Below is a list of your other Available Actions. Select an Action, verify the effective date and click Start.

Select Action and ... Start

Select Action	Department	Job	Status	Start Date	*Effective Date	Notes
<input checked="" type="radio"/> Employee Status Change V4.0	313th Military Intelligence Battalion	11011.Commanding General	New	20-Nov-2003 (example: 31-Dec-2000)	20-Nov-2003 (example: 31-Dec-2000)	No previous approved Pay Proposal exists for this person. Due to existing changes entered, date cannot be before 18-Sep-2003.
<input type="radio"/> Change Hours V4.0	313th Military Intelligence Battalion	11011.Commanding General	New	20-Nov-2003 (example: 31-Dec-2000)	20-Nov-2003 (example: 31-Dec-2000)	No previous approved Pay Proposal exists for this person. Due to existing changes entered, date cannot be before 18-Sep-2003.
<input type="radio"/> Change Manager V4.0	313th Military Intelligence Battalion	11011.Commanding General	New	20-Nov-2003 (example: 31-Dec-2000)	20-Nov-2003 (example: 31-Dec-2000)	Due to existing changes entered, date cannot be before 18-Sep-2003.
<input type="radio"/> Change Base Salary V4.0	313th Military Intelligence Battalion	11011.Commanding General	New	20-Nov-2003 (example: 31-Dec-2000)	20-Nov-2003 (example: 31-Dec-2000)	No previous approved Pay Proposal exists for this person. Due to existing changes entered, date cannot be before 18-Sep-2003.
<input type="radio"/> Termination V4.0	313th Military Intelligence Battalion	11011.Commanding General	New	20-Nov-2003 (example: 31-Dec-2000)	20-Nov-2003 (example: 31-Dec-2000)	

Figure 6-60. Perform Employee Action

The manager enters the reason for the termination and comments, if applicable, then chooses “Next” (figure 6-61). At this stage, the manager can either save the action for later processing or complete the action.

ORACLE® Human Resources Return to Portal Logout Preferences

Selected Employee **Abbott, Mrs. Donna M** Effective Date **20-Nov-2003**
 Employee Number **45** (example: 31-Dec-2000)
 Manager Name **Gregory, Mr. Hal A** Department **313th Military Intelligence Battalion**
 Job **11011.Commanding General**

Termination

* Indicates required field

Enter the date the termination notice was given (by you or by the employee), and select a reason for the termination. Click Next to continue this action, click Back to return to the previous page, click Cancel to cancel this action, or click Save For Later to finish this action later.

Termination Date **20-Nov-2003**
 (example: 31-Dec-2000)

* Notification Date **20-Nov-2003**
 (example: 31-Dec-2000)

* Reason **Termination**

Comments

Save for Later Cancel Back Next

Figure 6-61. Reason for Termination

System notifies the losing manager to reassign direct reports to a new manager (figure 6-62). The losing manager identifies the new manager and the transfer date.

ORACLE
Human Resources

[Return to Portal](#) [Logout](#) [Preferences](#)

Selected Employee **Abbott, Mrs. Donna M**
 Employee Number **45**
 Manager Name **Gregory, Mr. Hal A**

Effective Date **20-Nov-2003**
(example: 31-Dec-2000)
 Department **313th Military Intelligence Battalion**
 Job **11011.Commanding General**

Change Manager
 Enter or change any details below. Click Next to continue this action, click Back to return to the previous page, click Cancel to cancel this action, or click Save for Later to finish this action later.

Reassign Direct Reports to a New Manager
 The selected employee's direct reports are shown below. To reassign them to a new manager, enter the name of the new manager. Anyone reporting to direct reports will remain unchanged.

New Manager

Transfer Date
(example: 31-Dec-2000)

Employee Name	Manager Name	Effective Transfer Date	Primary	Employee Number	Job
Harris, Mr. Randall C	<input type="text" value="Abbott, Mrs. Donna M"/>	<input type="text" value="20-Nov-2003"/>	<input checked="" type="checkbox"/> Yes	6111101	Administrative Specialist
Porter, Mr. Bruce L	<input type="text" value="Abbott, Mrs. Donna M"/>	<input type="text" value="20-Nov-2003"/>	<input checked="" type="checkbox"/> Yes	7792Y1	Unit Supply Specialist
Powell, Mr. Geoffrey R	<input type="text" value="Abbott, Mrs. Donna M"/>	<input type="text" value="20-Nov-2003"/>	<input checked="" type="checkbox"/> Yes	7874C1	Telecom Operator/Maintainer

Figure 6-62. Change Manager Action

Limitations

- ◆ Current business rules would need modification for the process to become more fully automated.
- ◆ The COTS product would need a bolt-on CMS solution in the interim for documentation of current process.
- ◆ In the current Oracle application, only the supervisor can start the retirement process through self-service once the employee sends notification. The employee cannot initiate the process through COTS self-service.

Risks

- ◆ Unless Oracle Payroll also is implemented, pay rules for final calculation in payroll will be a manual process.

Benefits

- ◆ COTS product provides real-time notification for subordinates to be reassigned.
- ◆ COTS product currently delivers retirement option for an employee.
- ◆ Workflow also is delivered in the COTS system as a coordination solution system.
- ◆ COTS solution empowers the commander or supervisor to delegate approval action.
- ◆ There is a one-page action view for the commander to start an action.

7. Service Delivery Model Summary

Service will be delivered through a Front-Line Cadre, Air Force Portal, or Contact Center. The left side of **figure 7-1** lists these approaches, while the right side shows the relative service cost and notional service volume relationship for each approach across all business areas. The AF Portal is the least costly approach and is well suited to absorbing much of the current transaction activity. In terms of cost, the Contact Center is the mid-range solution; it focuses on activities not accomplished effectively through the AF Portal and provides some assistance when individuals are confused or unable to access the AF Portal. The Front-Line Cadre is the most costly solution and would be transformed to perform only functions that require face-to-face assistance. A large portion of front-line support activity would involve providing advice and assistance to commanders, supervisors, and other customers.

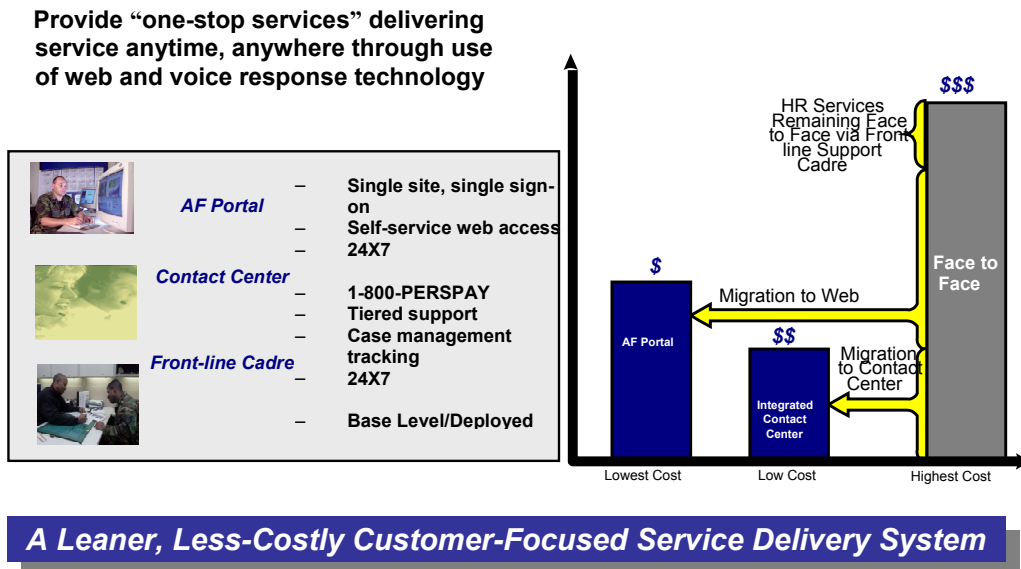


Figure 7-1. Service Delivery Model

The Lab developed a Service Delivery Model Summary for Business Area 16, Retirements (**figure 7-2**). The estimated savings and workload realignment from business process redesign is significant. For the military retirement processes, the Lab estimated a reduction of 98% in front-line support after transition to the To-Be processes. The Air Force Portal would accomplish an estimated 73% of the workload, becoming the principal method for conducting the military retirement programs. The Contact Center would support an estimated 25% of the retirement processes; and front-line personnel would accomplish the remaining 2%.

Method	As-Is	To-Be
Front-Line Support	100%	2%
Contact Center	0%	25%
Portal	0%	73%
Total	100%	100%

Figure 7-2. Military Service Delivery Model Summary for BA 16 Retirements

For the civilian retirement processes, the Lab estimated a reduction of 1% in front-line support and a nearly 20% reduction in existing Contact Center personnel after transition to the To-Be processes. The Air Force Portal would increase process efficiency by approximately 20%. The

Contact Center would support an estimated 71% of the retirement processes, with front-line personnel supporting the remaining 9%.

Method	As-Is	To-Be
Front-Line Support	10%	9%
Contact Center	90%	71%
Portal	0%	20%
Total	100%	100%

Figure 7-3. Civilian Service Delivery Model Summary for BA 16 Retirements

The Service Delivery Model Summary is shown in **figure 7-4**.

Service Delivery Model											
	As-Is				To-Be				Difference		
	Front-Line	Contact Center	Portal		Front-Line	Contact Center	Portal		Front-Line	Contact Center	Portal
Military Obtains Notification for Temporary Disability Retired List (TDRL)	100	0	0		0	2	98		-100	2	98
Military RCSBP Annuity Cases (Reserve-ANG)	100	0	0		1	57	42		-99	57	42
Civilian Disability Retirement Action	40	60	0		40	50	10		0	-10	10
Civilian Retirements	5	95	0		5	75	20		0	-20	20
Military Retirements	100	0	0		4	17	79		-96	17	79
Civilian Voluntary Contributions, Deposits/Redeposits, and Refunds to/from Retirement Accounts	5	95	0		0	65	35		-5	-30	35
Civilian Federal Erroneous Retirement Coverage Corrections Act (FERCCA) or Retirement Coverage Errors	0	100	0		0	98	2		0	-2	2
Civilian Retirement Counseling/Estimate	0	100	0		0	65	35		0	-35	35
Military Average	100	0	0		2	25	73		-98	25	73
Civilian Average	10	90	0		9	71	20		-1	-19	20

Figure 7-4. Service Delivery Model Summary

8. Issue Report Summary

The As-Is civilian retirement processes included only those personnel receiving full-service from AFPC (83 bases). There was no information available from other servicing organizations receiving limited service from AFPC for civilian personnel (13 bases). The Lab decided that the To-Be processes could work across the entire civilian spectrum in the redesigned environment, but there was no substantiating data. The full-time equivalents identified included only those impacted by AFPC-serviced bases.

The Lab combined the military retirement As-Is processes for active duty, Guard, and Reserve components into a single To-Be process. The ARPC representative objected to including the Reserves in a combined To-Be process. The Lab participants and team members worked with the ARPC representative to address her concerns within the process. The Lab added additional processing boxes and notes to the To-Be charts to ensure that all Reserve concerns were included. Specifically, on the To-Be flowcharts for Process 5.5., Processes Military Retirements, (**figure 5-97**) contains a note outlining the exceptions to processing of retirement applications for the Guard and Reserve. In **figure 5-98**, the Lab added a new decision box to indicate an alternate processing route for Reserve personnel age 60 or older. In **figure 5-99**, the Lab added a new processing box for processing Reserve personnel age 60. There was consensus among the Lab personnel that the changes accommodated the Guard/Reserve. However, the ARPC representative remained skeptical about whether the changes could be successfully implemented for ARPC.

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9. Fit-Gap Analysis Summary

The fit-gap analysis presents an assessment of functionality desired in the To-Be vision system when compared to MILPDS, DIMHRS, DCPDS, and COTS software capabilities. The seven areas assessed are the ability of the system to: (1) initiate a process, (2) create the appropriate Information Management Tool (IMT) prepopulated with data, (3) allow e-coordination, (4) allow in-system certification/e-signature, (5) allow in-system automatic update, (6) archive the appropriate information including narratives that are part of the IMTs, and (7) produce hard copies of documents as needed.

The DIMHRS use case does not cover the breadth of the military To-Be processes assessed in the Lab. The DIMHRS use cases do not specifically address the following To-Be processes:

- ◆ Obtains Notification for Temporary Disability Retired List (TDRL)
- ◆ Reserve Component Survivor Benefit Plan (RCSBP) Annuity Cases

Figures 9-1 and 9-2 show the capabilities of existing products and how the system could be if it were developed to take advantage of these capabilities. It is important to note that the DIMHRS use cases do not address all To-Be processes. Thus, the DIMHRS information in **figure 9-1** is what the use case says DIMHRS will do for those processes that are addressed.

For each validated process there is a fit-gap chart presented in Section 5 in the format shown in the notional data presented in **figures 9-1 and 9-2**.

The key below refers to the system as it exists today (DCPDS/MILPDS) or reflects the capabilities of existing products and how the system could be if it were developed to take advantage of these capabilities (DCPDS Plus/DIMHRS/PeopleSoft/Oracle/PureEdge).

- ◆ C = Customization of COTS software recommended
- ◆ M = Modification of COTS software recommended
- ◆ N = Not available in COTS software—Bolt-on required. A bolt-on could be external COTS software or a custom program, such as WAPS/PRISM or MILPDS suspense routines.
- ◆ Y = Available in software

To-Be Process Flow	Initiate ²	Create	Coord ³	Certify ³	Update	Archive	Produce Document
MILPDS	N	N	N	N	Y	N	N
DIMHRS ¹	N	Y	Y	Y	Y	N	Y
PeopleSoft ¹	N	M	Y	N	Y	N	M
Oracle	N	M	Y	N	Y	Y ⁴	M
CMS ⁵	N	Y	Y	Y	N	Y	Y

Figure 9-1. BA 16 Retirements Fit-Gap Summary (Military Retirement Processes)

Note 1: The Lab is using the same version of PeopleSoft as DIMHRS. When not otherwise specified by DIMHRS use cases, fit-gap analysis will be based on the expertise of Lab PeopleSoft personnel. Differences between the two in the fit-gap analysis will be caused by DIMHRS use cases clearly not using a capability available in PeopleSoft, or providing a capability known to not be available in the PeopleSoft product as delivered.

Note 2: In-system initiation requires an analytical engine loaded with the business rules. Changes to the business rules (number of days notification is given in advance of action, etc.) require ongoing maintenance. The purpose of the N in the Initiate column of both civilian and military fit-gap analysis charts is to recognize that the majority of BA16, Retirements, processes are initiated by the member, and are, therefore, a reflection of the process, not the capability of the software.

Note 3: In-system coordination (including tracking) and certification using the COTS product workflow capability will require continued maintenance/administration.

Note 4: Oracle 11i application has an embedded content management system for document storage.

Note 5: A Content Management System (CMS) allows creation, modification, and storage of documents in electronic form, and provides a method of version control. The CMS stores data only as they are related to a document or field in a form. Depending on the CMS, there may or may not be other capabilities, such as workflow, tracking, document searches, and digital signatures. The Lab is using PureEdge, which by itself provides electronic forms and data prepopulation (create), and can print the form (produce doc). If the PureEdge product is paired up with other bolt-on products/systems, like the IBM Content Management solution, then further capabilities are available, such as workflow (coordination), electronic signature (certify), and saving the document contents (archive).

To-Be Process Flow	Initiate	Create	Coord	Certify	Update	Archive	Produce Document
DCPDS	N	Y	Y	Y	Y	Y	Y
DCPDS Plus	Y	Y	Y	Y	Y	Y	Y

Figure 9-2. BA 16 Retirements Fit-Gap Summary (Civilian Retirement Processes)

10. Strategy and Phasing Summary

The To-Be strategy and phasing implementation offers a substantial opportunity for short-term benefit through the use of a CMS that is able to cross business areas, providing process enhancements across the entire HR area.

The Lab envisions implementing a CMS on MILPDS to begin reaping the To-Be processes' many benefits. While this discussion focuses on military and civilian retirements, other business areas also can leverage CMS benefits, and CMS resources can be used in broader applications.

With DCPDS the approach is similar, but approval from the DCPDS Joint Program Management Office would be required before the Web-based application could push data into DCPDS, meaning that in the short term DCPDS updates would be accomplished manually.

In the mid term, CMS and its benefits will be applied to or be a part of DIMHRS. Elements of the To-Be processes that DIMHRS does not support (but which are critical to the AF) will be captured in DIMHRS Plus applications in the long term.

With DCPDS the mid-term approach is to enhance DCPDS to allow data to automatically update rather than require manual update. Those elements of the To-Be processes that DCPDS does not support (but which are critical to the AF) would be captured in DCPDS Plus applications in the long term.

A description of the short, mid, and long terms follows (**figures 10-1 and 10-2**):

- ◆ **Short-Term.** The To-Be process will use existing Web-based technology and a CMS as an add-on to MILPDS to accomplish the To-Be objectives. This will enable document initiation, coordination, certification, decision making, and updates, as well as archival and document generation in the system.
- ◆ **Mid-Term.** The implementation of DIMHRS becomes the mid-term solution. This will require coordination with JR&IO to ensure that To-Be functionality is captured in DIMHRS.
- ◆ **Long-Term.** For military retirements, the long-term solution becomes DIMHRS Plus.

Total Force	Short-Term	Mid-Term	Long-Term
Military	CMS	DIMHRS	DIMHRS Plus

Figure 10-1. Strategy and Phasing (Military)

Total Force	Short-Term	Mid-Term	Long-Term
Civilian	DCPDS	DCPDS	DCPDS Plus

Figure 10-2. Strategy and Phasing (Civilian)

Along with the migration strategy and phasing to the To-Be processes, the Lab also seeks to identify “quick-win” opportunities—a To-Be process or series of To-Be processes that satisfy the following conditions:

- ◆ The process can be implemented in part or in whole for the short term.
- ◆ The process provides significant benefits to the customer that exceed the level of effort involved today.
- ◆ The process does not create additional risks or elevate any low-impact risks or risks that could be mitigated easily to a low-impact state.

Using this definition, most of the processes in BA 16 Retirements are “quick-win” candidates. While the full benefit of process redesign depends on the CMS and HRMS, implementation of CMS capabilities will result in a quick win. A CMS produces workload savings by eliminating

the need for local and regional databases to track retirements and the large effort expended on advising, tracking, distributing, and mailing hard copy retirement documents. The Lab estimates that To-Be processes will save more than 228,000 work hours compared to the As-Is processes. Implementing a CMS alone would provide a portion of these savings in the short term. Further, the CMS provides a basis for quick wins in other business areas because all business areas can share its implementation.

11. Assessment of Who Should Do the Work Summary

The CST Lab used the core competency questions shown in **figure 11-1** to address who should perform the work. The Lab determined that the validated military and civilian retirement processes are neither Inherently Governmental (military or civilian airmen must complete) nor Military Essential (military airmen must complete).

Criteria	Yes/No
Does this process require deep knowledge of Air Force strategy, procedures, and culture that cannot be learned without having recently been a military airmen or civilian?	No
Is there significant customer value added or differentiation from competitors when an airmen performs this activity?	No
Does this process focus more on policy development or implementation guidance rather than procedural and administrative activities?	No
Does this process contribute directly to enhancing the skills and capabilities of military or civilian airmen?	No
Does this activity have great direct impact on the retention of airmen?	No

Figure 11-1. Core Competency Questions

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12. Training Need and Potential Career Field Impact Summary

The Lab proposes a retirement process that requires personnel to be trained in computer operations to a medium proficiency level. Training will concentrate on how to request, coordinate, certify, suspense, and track retirements electronically from initiation through completion in a virtual system. The Air Force could then reduce associated training on the military and civilian retirement processes for military- and government-essential personnel.

This change in processing will affect the military and civilian HR career fields and the Financial Management career field by changing the focus of training for those processes in Technical Training Schools and On-The-Job Training. Career development courses also will have to be revised to reflect the changes involved with the new processes.

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13. Benefit Analysis Summary

The current As-Is environment is manpower- and paperwork-intensive, requires many locally developed and maintained databases, and often relies on manual updates to ensure retirements are processed and recorded properly. In 2002, there were almost 30,000 retirement actions, 3,000 civilian retirements, and more than 13,000 civilian retirement-related actions. The As-Is enterprise HR workload is estimated to be more than 356,000 labor hours, or 200 full-time equivalents (FTE). The To-Be environment is considerably less manpower-intensive. Lab participants believe the process redesign for this business area could reduce HR workload by about 64% or more than 228,000 labor hours. This HR workload savings is over 120 FTEs. The validated To-Be processes will require an estimated 128,000 labor hours.

Note: The civilian data identified include only those actions performed by AFPC. However, the To-Be processes should be implemented throughout the Air Force.

The Lab also substantially changed the service delivery model from labor-intensive front-line and Contact Center support in the As-Is model to a To-Be model incorporating a Web portal that could reduce labor hours by an estimated 64%.

The Lab also reduced cycle time substantially. The Lab participants estimate that the To-Be processes will compress military HR cycle times by a factor of 3.3, while civilian HR cycle time remains largely unchanged. Customer/decision-maker cycle times were not significantly impacted because the initiation and completion of retirement actions are largely driven by personal/policy decision, as opposed to process efficiency.

In addition, Lab participants' estimate that To-Be processes will reduce customer workload by a weighted average of 23% (25% for military and 14% for civilian processes) while improving access, functionality, accuracy, and accountability and increasing reliability and morale.

Transforming the military and civilian retirement processes leverages capabilities inherent in a content management system (CMS) and modern human resources management system (HRMS), such as in-system initiation, creation, coordination, certification, update, and archival of retirement processes. BPR that takes these capabilities into account removes HR from nearly all bureaucratic transaction processing.

The To-Be process redesign will do the following:

- ◆ Use an e-business approach to initiate, create, coordinate, certify, update, and archive retirements, while ensuring that appropriate security is built in according to business rules
- ◆ Ensure that a quality check is built in
- ◆ Ensure that status is available to appropriate authorities
- ◆ Ensure that the solution can apply to the Total Force
- ◆ Notify members when documents are made official
- ◆ Work in times of peace and war
- ◆ Reduce erroneous retirement applications
- ◆ Improve accountability and tracking
- ◆ Consolidate expertise as necessary
- ◆ Provide increased functionality and applicability
- ◆ Improve the accessibility and accuracy of records
- ◆ Improve the morale of those removed from transaction processing and those with reduced workloads

- ◆ Make substantial labor hours available for transfer to high-priority manpower requirements.

Figure 13-1 details BPR benefits. The As-Is enterprise HR workload associated with military and civilian retirements exceeds 356,000 labor hours (more than 200 FTEs), based on calculations from the As-Is spreadsheets supplied by AFMA and AFPC. The FTE workyear is 1,776 labor hours. The To-Be workload after business process redesign is estimated over 128,000 labor hours, or 72 FTEs. This estimate represents potential savings of 228,000 labor hours, or approximately 128 FTEs, for DIMHRS Business Area 16, Retirements.

To-Be Processes	As-Is		To-Be		
	Process Time (Minutes)	Frequency (Annual)	HR Workload Reduction	Customer Workload Change	Process Time (Minutes)
Military Obtains Notification for Temporary Disability Retired List (TDRL)	212	1,310	-98%	0%	4
Military RCSBP Annuity Cases (Reserve-ANG)	120	180	-42%	-10%	70
Civilian Disability Retirement Action	1,069	250	-10%	-5%	962
Civilian Retirements	533	2,750	-20%	-20%	426
Military Retirements	621	2,9376	-79%	-20%	130
Civilian Voluntary Contributions, Deposits/Redeposits, and Refunds to/from Retirement Accounts	91	5,250	-35%	-20%	59
Civilian Federal Erroneous Retirement Coverage Corrections Act (FERCCA) or Retirement Coverage Errors	565	250	-2%	0%	554
Civilian Retirement Counseling/Estimate)	136	3,750	-35%	0%	88
Military To-Be Average			-70%	-25%	
Civilian To-Be Average			-23%	-14%	
Total To-Be Average			-64%	-23%	

Figure 13-1. BA 16 Retirements To-Be Summary

Note: The reduction in HR workload does not include the potential reduction in FM workload for each military retirement process.

14. Assumptions

Figure 14-1 outlines the assumptions identified by the Lab as each process was reviewed and redesigned.

Assumption	Explanation
Facilitate Online, On-Demand Needs	Funding and support for enabling technologies will be made available to facilitate enterprise-wide, online, on-demand need, including expanded Contact Center operations to achieve 24x7x365 capability (including industry-standard IVRS support).
Resource Savings	Resource savings will not be realized until new processes and/or systems are fully implemented and certified as operational by the HR-SPO. Requirements for dedicated, full-time military or civilian personnel to achieve transformation objectives will be filled from existing resources prior to identifying any potential savings.
Marketing and Training Resources	Senior leadership will ensure that resources are made available to market and train customer users as well as HR service providers on new systems and business processes as part of an ongoing change management plan.
Savings Achieved Through New Processes and Technologies	Sufficient savings will be achieved by implementing new processes and enabling technologies to eliminate the gap between today's stated mission requirements and existing authorizations, and offset the effect of shifting as much as 20% of HR-related resources to operational requirements for the warfighter.
Timing of Reduction or Reallocation of Resource Savings	Senior leadership will ensure that current systems and support resources (people and dollars) based on existing processes are not turned off, reduced, or reallocated until new processes and systems have been implemented and proven operationally, their requirements validated, and new manpower standards established by AFMIA.
Continuous Portal Support	The Air Force Portal will provide the available bandwidth and reliability to support millions of customer transactions per year on a 24x7x365 basis from peacetime through wartime.
Face to Face Only When Essential	Front-line support will be minimized to the greatest extent possible.
E-Business Approach to Forms (Virtual Records and CMS)	An e-business approach will be used to the maximum extent possible.
Electronic Signature Availability	Electronic signature will be available in garrisons and at deployed locations.
Reliable Data	Data in the system are correct and available to all with access permission.
Electronic Tracking	Content Management System will track electronic forms in coordination

Figure 14-1. Assumptions

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15. Metrics for Measuring Success

The Customer Service Transformation Office (CSTO) plans to collect and maintain performance data for the following metrics:

- ◆ Customer satisfaction
- ◆ Number of self-service applications available via the AF Portal and Contact Center
- ◆ Self-service transactions as a percentage of total personnel/pay transactions
- ◆ Labor savings that result from reducing levels of effort and compressing cycle times.

Each month, these data will be collected and the results computed for each metric, providing quantitative data with which to assess progress toward achieving the Air Force's business operations transformation.

The Air Force transformation objectives supported by each metric and the mechanics of data collection are detailed below. CSTO Spiral Directors, working with the CST Project Manager and HR Lab Director, have the prerogative to add metrics based on the objectives of a specific business area or the characteristics of its supporting processes and enabling system applications.

Metric 1: Customer Satisfaction

- ◆ Improve Effectiveness
- ◆ Empower Personnel

Mechanics

AF Portal. Customer satisfaction will be measured by a three-to-five-question survey, to which users are automatically linked immediately after they complete a Web-based transaction via the AF Portal. Clicking the "Submit" button will automatically route the survey responses to a CST collection point.

Virtual Contact Center. Customer satisfaction will be measured using a three-to-five-question Web-based survey e-mailed to customers immediately after they complete an interactive voice response (IVR) transaction or receive the assistance of a personnel/pay specialist over the phone or by e-mail. Clicking the "Submit" button will automatically route the survey response to a CST collection point.

Front-Line Support. Customer satisfaction will be measured using a three-to-five-question Web-based survey e-mailed to customers immediately after they complete a transaction with the assistance of a personnel/pay specialist in person, over the phone, or by e-mail. Clicking the "Submit" button will automatically route the survey response to a CST collection point.

In all cases, after the data are collected, they will be analyzed to determine the level of customer satisfaction and identify areas in which improvement or additional training may be required.

Metric 2: Self-Service Applications Available via the AF Portal and Virtual Contact Center

- ◆ Improve Effectiveness
- ◆ Compress Process Cycle Time
- ◆ Reduce Workload
- ◆ Empower Personnel
- ◆ Shift Resources to the Warfighter

Mechanics

CSTO spiral directors will work with the program managers for vMPF/vCPF, myPay, among others, and the virtual Contact Center to establish the number of self-service applications that customers can access as part of documenting and validating processes for their respective business areas.

Metric 3: Self-Service Transactions as a Percentage of Total Transactions

- ◆ Improve Effectiveness
- ◆ Compress Process Cycle Time
- ◆ Reduce Workload
- ◆ Empower Personnel

Mechanics

CSTO spiral teams (e.g., spiral director, process analyst, and functional subject matter experts [SME]) will work with functional process owners and the program managers for vMPF/vCPF, myPay, and the virtual Contact Center to establish baselines for process cycle times and the percentage of total personnel/pay transactions currently completed using customer self-service applications as part of documenting and validating processes for their respective business areas.

The HR Lab will then provide estimates for process cycle time compression and To-Be percentages based on the results of its evaluation and the test of the processes' proof-of-concept designs.

Metric 4: Labor Savings (Reduced Levels of Effort and Compressed Cycle Times)

- ◆ Compress Process Cycle Time
- ◆ Reduce Workload
- ◆ Shift Resources to the Warfighter

Mechanics

CSTO spiral teams (e.g., spiral director, process analyst, and functional SMEs) will work with Air Force Manpower Agency (AFMA) analysts, functional process owners, and the program managers for vMPF/vCPF, myPay, and the virtual Contact Center to establish baselines for the number of labor hours or full-time equivalents (FTE) required to accomplish a given process as part of documenting and validating As-Is processes for their respective business areas. This information will be recorded in the As-Is PDD.

The HR Lab will then develop estimates for the number of labor hours or FTEs that should be saved based on reduced levels of effort and compressed cycle times, using information from its evaluation and test of each process's proof-of-concept design. These estimates will be included in the benefit analysis section of the HR Lab's To-Be PDD.

AFMA will compute and report the final number of labor-hour or FTE savings as part of developing and validating the new labor standards for each personnel/pay business area. This information will be included in the system change request or operational requirements document produced by the Human Resource Requirements Office (HR-RO).

Collecting, documenting, and reporting measurements of success for CST initiatives will enable CSTO to support critically important investment decisions with both qualitative and quantitative data.

16. List of Lab Attendees

Participants	
LtCol Mitchel Butikofer	1 CS/CC, Langley AFB, VA
SMSgt Kevin Brown	HQ USAFE/DPPFP, Ramstein AB, GE
SMSgt Michael Yuds	91 MOS, Minot AFB, ND
MSgt William Brown	AFPC/DPPR, Randolph AFB, TX
MSgt Steve Westmoreland	AFRC/DPML, Robins AFB, GA
TSgt Debra Campbell	AFPC/DPSFM, Randolph AFB, TX
TSgt Brenda Gomez	72 MSS/DPM, Tinker AFB, OK
TSgt Twiana Speaks	116 AWC, Robins AFB, GA
TSgt Karla Williams	HQ AMC/CCQ, Scott AFB, IL
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HR Lab Staff	
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Dan Murphy	AFPOA/DPXLL
Terry Stevens	AFPOA/DPXLL
Richard Thompson	AFPOA/DPXLL
Alesia Stahl	AFPOA/DPXLL
Daryl Golden	AFPOA/DPXLL
Jim Childress	AFPOA/DPXLL
Johnny Hall	AFPOA/DPXLL
Candice Green	AFPOA/DPXLL
Charles Witt	AFPOA/DPXLL
Stewart Beam	AFPOA/DPXLL
Micheal Myers	AFPOA/DPXLL
Thomas Carmean	AFPOA/DPXLL
Jennifer Stier	AFPOA/DPXLL
Anthony Jones	AFPOA/DPXLL
Brian Safreed	AFPOA/DPXLL
Kevin King	AFPOA/DPXLL

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17. List of Terms and Definitions

Activity—A series of transactions that translates inputs into outputs using resources in response to a business requirement; sequences of activities that in logical combinations form processes.

AFA—Air Force Association

AFOEA—Air Force Organizational Excellence Award

AFOUA—Air Force Outstanding Unit Award

Baseline Measurement—A beginning point based on an evaluation of output over a period of time to determine how a process performs prior to any improvement effort.

Baselining—To establish a beginning point based on an evaluation of output over a period of time to determine how a process performs prior to any improvement effort.

Benchmarking—The process of finding and adapting best practices to improve organizational performance; a systematic and continuous measurement process; a process of continuously comparing and measuring an organization's business processes against business leaders anywhere in the world to gain information that will help the organization improve its performance.

Benchmark—A performance level recognized as the standard of excellence for that process; measured “best-in-class” achievement; a reference or measurement standard for comparison.

Benchmarking Gap—The difference in performance between the benchmark for a particular activity and other organizations in the comparison; the measured leadership advantage of the benchmark organization over other organizations.

Benefits and Entitlement Service Team (BEST)—BEST provides customer service and current benefits information for Air Force-serviced civilian employees in the following programs:

- ◆ Federal Employees Health Benefits (FEHB) Program
- ◆ Federal Employees Group Life Insurance (FEGLI) Program
- ◆ Thrift Savings Plan (TSP)
- ◆ Retirement and Retirement-Related Programs
- ◆ Survivorship (Death-in-Service Survivor Benefits)

Best in Class—Description of a process that provides the best performance identifiable for that process without regard to the industry or type of organization; outstanding process performance within an industry; “best practice” is a synonym.

Best Practice—A superior method or innovative practice that contributes to improved process performance. Superior performance within a function independent of industry, leadership, management, or operational methods or approaches that lead to exceptional performance; best practice is a relative term and usually indicates innovative or interesting business practices that have been identified as contributing to improved performance at leading organizations.

BPR—Business Process Redesign

Breakthrough—A dynamic, decisive movement to new, higher levels of performance.

Capability Mapping—The analysis of the business infrastructure of an organization to determine unique abilities and potential.

Case for Change—Defining and articulating the reason for improvement(s).

Comparative Analysis—The process of analyzing the magnitude and rationale of any gap between the processes of an organization being reengineered and the processes of other organizations.

Competitive Sourcing—Choosing the most efficient and effective method for receiving products and services in concert with mission, legal, and other requirements. Competitive sourcing typically is a choice between in-house accomplishment and competitive sourcing on the basis of OMB Circular A-76 cost comparison, privatization, etc.

Content Management System (CMS)—An easy-to-use interface that allows non-technical personnel to easily update, create, and format content, a CMS also defines when a change should be published. A CMS automatically updates Web sites and site navigation to reflect changes. A CMS also can create photo libraries and document libraries for all users. Users easily can create new pages and preview content before it is published.

Continuous Process Improvement—Ongoing improvement of business processes in terms of quality, cost, or cycle time; the idea that quality management and improvement is necessarily a continuous activity to ensure ongoing customer satisfaction and improved efficiency.

Contract Manpower Equivalent (CME)—The number of man-years required if in-house employees or a contractor workforce perform a contracted workload at a specified level of performance.

Core Competencies—Strategic business capabilities that provide an organization with a competitive advantage.

COTS—Commercial-off-the-shelf software or hardware.

Customer—Anyone for whom an organization or individual provides goods or services; can be internal or external to the organization.

Customer Advocate—A team member who pleads the case of the customer and calls the attention of the team to issues that would concern the customer.

Customer Analysis—The evaluation of customer conditions and trends relative to a particular business product or service—tools include customer focus groups, field trial testing, customer satisfaction measurement, customer feedback systems, and various types of questionnaires and survey instruments.

Customization—Changes to a COTS product that will likely be an issue in future upgrades.

Cycle Time—The total number of calendar days from initiation of a process until it is complete; includes coordination and decision making.

DCPDS—Defense Civilian Personnel Data System

Decision Authority—The official who approves requests for personnel/pay actions. There may be more than one level of coordination for approval/disapproval recommendation, but there should be only one Decision Authority associated with the process.

DIMHRS—Defense Integrated Military Human Resources System

Employee Benefits Information System (EBIS)—is an automated Web application for an Air Force–served civilian employee that allows members to:

- ◆ Conduct online benefits transactions
- ◆ Create or change BEST personal identification numbers (PIN)
- ◆ Obtain retirement annuity estimates

◆ Obtain general program information

Empowerment—Activities a person can initiate or complete 24x7 without Front-Line Cadre or Contact Center involvement.

End Strength—The count of Air Force military and civilian positions that need to be funded in each year of the Future Years Defense Program (FYDP) to accomplish all approved missions. End strength provides the basis for funded man-years within the personnel system and provides a target for personnel plans, programs, and budgets. End strength is a resource provided to support approved force structure, programs, or missions. End strength changes do not drive force structure or mission changes; they are tied to programmatic increases and decreases in force structure or mission. FYDP end strength is allocated to commands by program element code and category.

Enabler—A process, practice, or method that facilitates the implementation of a best practice; enablers help explain the reasons behind the performance indicated by a benchmark.

Enterprise wide—Impacting civilian and military active, guard, and reserve at all levels from base level through MAJCOMs, FOAs, Air Staff, and Joint Staff.

Entitlement—The best that can be achieved in process performance using current resources to eliminate waste and improve cycle time; obvious improvements identified during the process of benchmarking that may be accomplished as short-term goals; identical to enablers except that entitlements exist within the current organization—the benchmarking process identifies them and the organization is therefore entitled to them without requiring additional manpower or money.

Environmental Scan—Looking for possible factors, technologies, or trends that affect the current organization/process or that may affect the future organization/process.

ERP—Enterprise resource planning

Etiquette—The conduct or procedure required to be observed in social or official life.

Executive Sponsor—Sponsor from upper-level management; this person must have enough authority to be able to gain and sustain support for the project. Executive sponsors approve team charters.

Financial Services Office (FSO)—The Office of Primary Responsibility for administering financial services activities, programs, and operations. Activities include accounting liaison, military/civilian/travel pay customer service and customer support, and disbursement/cashier functions.

Fit-Gap Analysis—An assessment of the capability of an application to deliver the functionality required in the To-Be process.

Five Fronts—Organizational areas that interrelate and must be considered during any improvement project.

1. Organization/People. Human resources are key to the future viability and growth of the organization in a continuous learning environment. As processes are redesigned or other changes are made, focus should remain on the worker, who must be enabled with appropriate knowledge, skills, experiences, and tools; empowered to learn and act; and rewarded based on the organization's values and measures.
2. Technology. This crucial enabling factor allows compression of cycle/lead time and distance, broader access to information and knowledge assets, and elimination of barriers between customers and suppliers.

3. Policies, Legislation, and Regulations. Changing existing policies, regulations, and legislation may be required for new processes.
4. Physical Infrastructure. The physical facilities, equipment, and tools should be designed to support and maximize changes in workflow, information technology, and human resources.
5. Process. The flow of work and information into, through, and out of the organization must be redesigned to overcome the constraints of traditional functions or boundaries.

Frequency—The number of times a process or subprocess occurs during a stated period of time.

Full-Time Equivalent (FTE)—Generally, in-house staffing should be expressed in terms of productive work hours. Once this is done, a conversion to the number of FTEs is needed. For civilian full-time, part-time, and temporary positions, estimate the total hours required by skill and divide by 1,776 annual available hours to determine the number of FTE positions required. For civilian intermittent positions to be expressed in FTEs, estimate total hours required by skill and divide by 2,007 annual available hours to determine the number of FTE positions required. For military positions, each service establishes annual available hours to be used for converting work hours to FTEs.

Future Years Defense Program (FYDP)—The official document and database that summarize Secretary of Defense–approved plans and programs for the Department of Defense and list manpower end strength.

Gap Analysis—The comparison of a current condition to the desired state.

GEICO—Government Employees Insurance Company

Goal—A broad statement describing a desired future condition or achievement without specifying quantity or date.

Hidden Gem—A benchmarking partner that is truly world-class, but not known as such.

High Impact—Likely to cause significant disruption of schedule and increased cost.

HRMS—Human Resources Management System

HR Specialist—The primary person responsible for, and with authority to perform, the administration and implementation of personnel and pay programs. (This could include the commanding officer of an organization or any other designated person at any Department of Defense organization level).

Implementation—Specific tasks that will make a strategy a reality.

Improved Effectiveness—Increased functionality, accuracy, and reliability.

Inherently Governmental—An activity so intimately related to public interest as to mandate performance by government personnel. These activities require the exercise of discretion in applying government authority, the use of value judgments in making decisions on behalf of the government, or obligation of funds/entitlements.

Input—Products and/or services received from suppliers in order to perform a process.

Internal Benchmarking—A good starting point to gain an understanding of internal performance standards. It is applicable mainly to large operations or businesses, where processes in one part of an organization or company are more efficient than processes in other parts.

JPMO—Joint Program Management Office (applies to DCPDS)

JR&IO—Joint Requirements and Integration Office (applies to DIMHRS)

Kaizen—“Kaizen means improvement. Moreover, it means continuing improvement in personal life, home life, social life, and working life. When applied to the workplace, Kaizen means continuing incremental improvement involving everyone—managers and workers alike.” (Kaizen Institute)

Key Process—The major system-level processes that support the mission and satisfy major customer requirements. Identification of key processes allows the organization to focus its resources on what is important to the customer.

Leadership Goal—A goal whose achievement will place an organization in a leadership position among similar organizations.

Long-Term Goal—A goal that may be accomplished over a longer period of time, usually 1 to 5 years.

Low Impact—Little impact and disruption of schedule.

Manpower—A critical resource that supports an approved program, it is not a program by itself and should not be manipulated separately from the program it supports.

Manpower Authorization—A funded manpower requirement that defines a position in terms of its function, organization, location, skill, grade, and other appropriate characteristics that commands use to extend end-strength manpower resources to their units.

Manpower Requirement—A statement of manpower needed to accomplish a job, workload, mission, or program. There are two types of manpower requirements—funded and unfunded. Funded manpower requirements are those that have been validated and allocated. Unfunded requirements are validated manpower needs that are deferred because of budgetary constraints.

Measurement—The act or process of quantitatively comparing results to requirements to arrive at a quantitative estimate of performance.

Member—A person who is affiliated with a service, either regular, reserve, or Guard (DoDI 1000.13). The manpower resource mix includes military and civilian members. Civilian members are referred to as either “member” or “employee” throughout the report.

Metric—A measure taken over a period of time that communicates vital information about a process or activity. A metric should drive appropriate leadership or management action.

Milestones—A mark of a significant point in development.

Military Essential—Positions that directly contribute to prosecution of war (combat or direct combat support), exercise Uniform Code of Military Justice authority, are required by law, are military due to custom or tradition, are needed for overseas rotations, or require a skill not available in civilian resources. Other workloads are not military essential and should be performed by in-service civilians or contract services.

Mission—The reason for an organization’s existence.

Mini-Vision—How a set of processes should be supported and executed in the To-Be environment (e.g., the AF Portal, Virtual Contact Center, or Front-Line Support Cadre). It is a conceptual framework and starting point to perform fit-gap analysis and proof-of-concept evaluations. The Mini-Vision is developed by the Customer Service Transformation Office spiral director, working with the functional policy owner, and approved by the Air Staff Director.

Model—A description, representation, or analogy used to help visualize something that cannot be directly understood.

Moderate Impact—Potentially causes some disruption of schedule, increased cost, or degradation of performance; needs special emphasis and close monitoring to overcome.

Modification—Changes to a COTS product that will likely not impact future upgrades.

Most Efficient Organization (MEO)—The in-house government organization deemed most efficient in competition with the private sector.

Networking—A decentralized organization of independent participants who develop a degree of interdependence and share a coherent set of values and interests.

NAA—Notable Achievement Award

Nominal—Insignificantly small; a matter of form only; “the fee was nominal;” a token gesture of resistance.

Notional—Not based on fact or investigation.

Objective—A specific statement of a desired short-term condition or achievement; includes measurable end results to be accomplished by specific teams of people within time limits. The “how, when, and who” for achieving a goal.

OCCSA—Outstanding Civilian Career Service Award

Office of Primary Responsibility (OPR)—Any headquarters, agency, or activity having primary functional interest in and responsibility for a specific action, project, plan, or program.

ORD—Operational Requirements Document

Partner—A relationship between two parties who are associates or colleagues involving close cooperation and implying joint rights and responsibilities.

PCIP—Productivity Cash Incentive Program

PDD—Process Design Document, the final output product from the To-Be Lab process.

Process—A set of interrelated work activities characterized by a set of specific inputs.

Process Benchmarking—The most common type of benchmarking; concentrates on discovering the best practices of a process regardless of industry.

Process Customer—Any individual or organization that may initiate a specific action or may be a part of the approval/disapproval process. A process customer may include a commander, supervisor, member, retiree, or dependent.

Process Owner—The person who coordinates various functions and work activities at all levels of a process, has the authority or ability to make changes in the process as required, and manages the process end-to-end so as to ensure optimal overall performance. Also, the person closest to the process being benchmarked who has authority to make changes to that process. This person typically is not part of the core benchmarking team, but his/her input is highly important. The Office of Primary Responsibility for a process.

Process Stakeholder—Individuals with an interest in the conduct of a particular process.

Process Time in Minutes—The amount of “hands-on” time required by HR staff to complete the process or subprocess once; this includes productive time only and not waiting time. It does not include time expended by anyone outside of the HR community.

Project Facilitator—The individual who focuses on the process of benchmarking and makes that process easier for the team.

Project Sponsor—The individual who provides financial support for a benchmarking project; an individual who plans and carries out a project or activity; one who assumes the responsibility for a project.

Protocol—A set of conventions governing the actions of individuals, organizations, or nations as specified by a written agreement; a code prescribing adherence to correct etiquette.

Quick Win—A “quick win” is a To-Be process or series of processes that satisfy the following conditions:

- ◆ Can be implemented in part or in whole for the short term
- ◆ Will return significant benefits to the customer compared to the level of effort involved today
- ◆ Does not create additional risks or elevate risks assessed as low impact or that can easily be mitigated to low impact.

Reengineering—The radical redesign of the business processes, organizational structures, management systems, and values of an organization to achieve breakthroughs in business performance.

Reverse Engineering—A comparison of the product characteristics, functionality, and performance with similar products made by competitors.

Risk—To expose to a chance of loss or damage; hazard.

Levels of Risk:

- ◆ *High*—Likely to cause significant disruption of schedule, increased cost, or degradation of performance. Risk may be unacceptable even with close monitoring.
- ◆ *Moderate*—Can potentially cause some disruption of schedule, increased cost, or degradation of performance. Special emphasis and close monitoring will probably be able to overcome difficulties.
- ◆ *Low*—Has little potential to cause disruption of schedule, increased cost, or degradation of performance. Normal effort and monitoring will probably be able to overcome difficulties.

Root Cause—A major factor that is directly and causally related to an observed quality problem. When a root cause is reduced or eliminated, the quality problem is also reduced significantly or eliminated.

SASA—Special Act or Service Award

SCR—System Change Request

SES—Senior Executive Service, equivalent to a general or flag officer.

Short-Term Goal—Goals that may be accomplished within a short time frame, usually less than 1 year.

Stakeholder—Any individual, group, or organization that will have a significant impact on or will be significantly impacted by the quality of the product or service provided.

Strategy—The plans and means to achieve the goal for a particular objective.

Strategic Alliance—A strategic bond or connection between organizations with common interests; an association to further the common interests of its participants.

Strategic Benchmarking—The analysis of world-class organizations or companies in competitive industries to identify opportunities for strategic change in core business processes. Example: What does it take to win in my business?

Strategic Planning—The process by which an organization envisions its future and develops special strategies and plans to achieve that future.

Subject Matter Expert (SME)—An individual whose knowledge of the content of a particular subject is considered to be exceptional.

Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis—By examining strengths, a project team can discover untapped potential. By examining weaknesses, a project team can identify gaps in performance, vulnerabilities, and erroneous assumptions about existing strategies. Strengths (what are we good at) and weaknesses (what are we not good at) are internal factors affecting a unit. External opportunities and threats are the positive and negative characteristics of the external environment. Examples: strength—competitive advantage; weakness—reduced workforce; opportunities—increased taskings; threat—loss of primary mission.

Task—A task is a discrete event or action, not specific to a single unit, weapon system, or individual, that allows a mission or function to be accomplished by individuals or organizations.

Task Assurance—A commander's internal tool to assess mission performance by measuring performance in relation to established standards and targets. The process of task assurance also helps identify unit strengths and areas for improvement.

Team Facilitator—A person specially trained as a teacher, coach, and moderator for a group, team, or organization. In benchmarking, the facilitator focuses on group process, while the team leader focuses on content.

Team Leader—A liaison between the benchmarking team and upper management, this person is typically responsible for results. The team leader provides direction and breaks barriers to team progress.

Team Member—An individual who participates on a team and may take on one or more roles in that team; individuals who understand and work with the process being benchmarked. As processes typically cross functions or departments, team composition should reflect the key functions involved.

Unit Manpower Document (UMD)—A detailed manpower listing, drawn from the manpower data system, reflecting the distribution of manpower allocations into a finite structure of authorizations and requirements by work center.

vCPF—Virtual Civilian Personnel Flight

vMPF—Virtual Military Personnel Flight

Vision—The fundamental beliefs that drive organizational behavior and decision making.

World-Class—Leading performance in a process independent of industry, function, or location.

18. Document History

Version	Date	Author	Description of Change
1.0	7 Jan 04	J. D. Hall	Draft of document

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19. Approval History

Approval Step	Date	Approved By
Preliminary		Division-level (0-6/GS-15)
Final		Directorate-level (GO or SES)

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Annex A. BA 16 Military and Civilian CSTO Data

Color Legend: MPF—Green; MAJCOM—Blue; AFSLMO—Brown; AFPC—Purple; CSS—Black

CSTO Data—BA 16 Military Retirement As Is Processes

Process Information		Process Title	Supporting Process Information			Does It Have an Application With			Precondition			Manpower Measurement Data (AD)				Manpower Measurement Data (ANG)				Manpower Measurement Data (Reserve Unit)				Manpower Measurement Data (ARPC—Reserves/Guard)			
Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs, U.S. Codes, DODDs)	Source Documents	Customer	MILPDS	PCIII	VMPF	My Pay	DJMS	AF Portal	Call Center/ IVRS	Front Line Support	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time (AD)	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time (ANG)	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	
1		RE—Performs Preliminary Retirement Separation Action (includes high year of tenure [HYT], age 60, MSD, and MED disqualification/disability)	ARPC/DPPR (IMA) ARPC/DPPS AFPC/DPPDS ANG/DP AFRC/DPML	AFIs 36-3209 36-3203 36-3212 36-2102 36-2612 36-3207 36-201 36-3208 ANGI 36-101 36-3205 AFCSM 36-3204 36-699 (vol 1)	AF Fm 131 AF Fm 1160 AF Fm 526 AF Fm 2656 NGB Fm 22 DD Fm 214WS DD Fm 214			mpf, cmdr, rescmdr, resunit, resmpf, angmpf, angunit, angcmdr	1. Initial Separation and Retirement Briefing 2. Retirement Entitlement Counseling 3. Retirement Application Field Version ARPC Web Site								6 Months (AD) 90 Days (ANG) 6 Months (RE)				6 Months						
1.1	MPF	RE	Receives inquiry from member (or HHQ generated, RC)		E-mail Message	HR Specialist Member						P	C		20	Per month	10		2	Per month	10		3	Per month	10		
1.2	MPF	RE	Notifies MBR when applicable		E-mail	Member						P	C		20	Per month	10		2	Per month	10		3	Per month	10		
1.3	MPF	RE	Runs retired pay estimates		Web Site Printout	HR Specialist Member						P	C		20	Per month	10		2	Per month	10						
1.4	MPF	RE	Provides member copy of pay estimates		Web Site Printout	HR Specialist Member						P	C		20	Per month	10		2	Per month	10						
1.5	MPF	RE	Briefs member on current policy/eligibility requirements			HR Specialist Member						P	C		20	Per month	45		2	Per month	45		3	Per month	45		
1.6	MPF	RE	Prepares retirement folder		Brown Folder	HR Member						P	C		20	Per month	5		2	Per month	10		3	Per month	5		
1.7	MPF	RE	Assists member in preparing retirement application		AF Fm 1160 AF Fm 131 AF Fm 526 DD Fm 2656	HR Specialist Member						P	C		20	Per month	20		2	Per month	20		3	Per month	20		
1.8	MBR	RE	Member signs preapplication or equivalent checklist		Form Letter	HR Specialist Member						P															
1.9	MBR		Member hand carries for commander's recommendation		AF Fm 131 AF Fm 1160	Member Commander						P															
1.10	MPF	RE	Receives/reviews recommendation			Commander						P			20	Per month	10		2	Per month	10		3	Per month	10		
1.11	MPF	RE	Inserts in folder		AF Fm 526 AF Fm 131 AF Fm 1160 Checklist Message/ E-Mail	HR Specialist						P			20	Per month	5		2	Per month	5		3	Per month	5		
1.12	MPF	RE	Updates E53 in MILPDS net 120 days from DOS/NLT 10 days prior to departure date (ANG—Tradition NET 60 NLT 90 days) (ANG AGRS 90–120 days [starts FSO process])		AF Fm 1160 AF Fm 131	HR Specialist	X				E53	P	C		20	Per month	20		2	Per month	20		3	Per month	5		
1.13	MPF	RE	Forwards copy for recommendation to appropriate authority/HQ ANG ARPC		AF Fm 1160 AF Fm 131	HR Specialist						P			20	Per month	20		2	Per month	20		3	Per month	5		
1.14	MPF	RE	Receives/reviews final decision/ANG; retirement orders/set up retirement		Message/ E-mail Orders	HR Specialist Member						P	C		20	Per month	15		2	Per month	15		3	Per month	15		
1.15	MPF	RE	Phones to notify member			HR Specialist Member						P	C		20	Per month	5		2	Per month	5		3	Per month	5		
1.16	MPF	RE	Receives/distributes retirement documents		Retirement Orders	HR Member						P	C		20	Per month	30		2	Per month	30		3	Per month	15		
1.17	MPF	RE	Schedules follow-up briefing to review separation/retirement documents		DD Fm 214WS DD Fm 214	HR Specialist Member						P	C		20	Per month	5		2	Per month	5		3	Per month	5		

Color Legend: MPF—Green; MAJCOM—Blue; AFSLMO—Brown; AFPC—Purple; CSS—Black

CSTO Data—BA 16 Military Retirement As Is Processes

Process Information		Process Title		Supporting Process Information			Does It Have an Application With		Predisposition			Manpower Measurement Data (AD)			Manpower Measurement Data (ANG)			Manpower Measurement Data (Reserve Unit)			Manpower Measurement Data (ARPC—Reserves/Guard)									
Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs, DODIs)	Source Documents	Customer	MILPDS	PCIII	VMPF	My Pay	DJMS	AF Portal	Call Center/ IVRS	Front Line Support	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time
2		RE—Retirement	AFPC/ DPPRR AFSLOMO ARPC/ DPPR NGB/GO	AFIs 36-3203 AF Fm 131 36-2102 ARPC/ DPPR 36-3209 36-3212 ANGI 36-3201, 36-101 AFCSM 36-699 (vol 1)	AF Fm 1160 AF Fm 131 AF Fm 526 DD Fm 2656		Y	N	Retirement Entitlement Counseling ARPC Web Site	Y	N			IMA (N)				5 Days				15 days								
2.1	CSS	CCQ	Member submits AF Form 1160 to CSS, CSS reviews and determines eligibility. If eligible, commander approves or disapproves. If AF Form 1160 is disapproved, return to member		E-mail	HR Specialist Member						P	C		22	Per year	5													
2.2	CSS	CCQ			E-mail	HR Specialist Member						P	C																	
2.3	MPF	RE	If approved, MPF receives approved AF 1160		E-mail	HR Specialist Member						P	C																	
2.4	MPF	RE	Updates MILPDS with projected retirement date		AF Fm 1160	Member	X					P	C		20	Per month	10			30	Per year	10		10	Per month	5				
2.5	MPF	RE	Sets up and prepares for relocation briefing			HR Specialist Member						P	C		20	Per month	20			30	Per year	15		10	Per month	5				
2.6	MPF	RE	Notifies individual of retirement briefing		E-mail	HR Specialist Member						P	C		20	Per month	5			30	Per year	10		10	Per month	20				
2.7	MPF	RE	Briefs member			HR Specialist Member						P	C		20	Per month	60			30	Per year	120		10	Per month	60				
2.8	MPF	RE	Receives additional information from member			Member						P	C		20	Per month	10			30	Per year	30		5	Per month	10				
2.9	MPF	RE	If waiver is required, fax to AFPC/Reserve mails to ARPC		AF Fm 1160/ Memo	HR Specialist Member						P	C		1	Per month	5						10	Per month	5					
2.10	AFPC	DPPR	Scans application and waiver information, sends to AFPC/assignments, checks manning and makes recommendation		AF Fm 1160/ Memo	HR Specialist Member						P	C		82	Per month	15													
2.11	AFPC	DPPR	Verifies MPF information		AF Fm 1160/ Memo	HR Specialist Member						P	C		1,833	Per month	10													
2.12	AFPC	DPPR	Verifies if member is on medical hold		AF Fm 1160	HR Specialist Member	X					P	C		1,833	Per month	5													
2.13	AFPC	DPPR	If on medical hold, updates "hold" in MILPDS and waits for release from hold or expiration			HR Specialist Member																								
2.14	AFPC	DPPR	Updates MILPDS if member is released from hold		AF Fm 1160	HR Specialist Member	X					P	C		3	Per month	5													
2.15	AFPC/ Reserve Unit	DPPR	Obtains final review/approval waiver or hold release		AF Fm 1160/ Memo	HR Specialist Member						P	C		85	Per month	5						10	Per month	5					
2.16	AFPC	DPPR	Concurrently AFPC pulls weekly roster (discover)			PSM						P			1	Per week (5 workdays/ week exc. holidays)	20													
2.17	AFPC	DPPR	Distributes to technician		Roster	HR Specialist						P	C		1	Per week (5 workdays/ week exc. holidays)	5													

Color Legend: MPF—Green; MAJCOM—Blue; AFSLMO—Brown; AFPC—Purple; CSS—Black

CSTO Data—BA 16 Military Retirement As Is Processes

Process Information		Process Title	Supporting Process Information				Does It Have an Application With				Predisposition			Manpower Measurement Data (AD)						Manpower Measurement Data (Reserve Unit)				Manpower Measurement Data (ARPC—Reserves/Guard)			
			Process Owner	Mandates (to include Public Laws, AFIs, DODIs)	Source Documents	Customer	MILPDS	PCIII	VMPP	My Pay	DJMS	AF Portal	Call Center/ IVRS	Front Line Support	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	
Process Number	Level	Work Center	Tasks			HR Specialist	X					P	C		1	Per week (5 workdays/ week exc. holidays)	10										
2.18	AFPC	DPPR	Technician verifies member retirement eligibility			HR Specialist	X					P	C		85	Per month	10			10	Per month						
2.19	AFPC/ Reserve Unit	DPPR	If approved, forward to AFPC/ARPC technician for MILPDS update; Reserve Units update MILPDS		AF Fm 1160/ Memo	HR Specialist Member	X					P	C		85	Per month	5			5	Per month						
2.20	AFPC/ Reserve Unit	DPPR	Files copy		AF Fm 1160/ Memo	HR Specialist Member						P	C		1,833	Per month	5										
2.21	AFPC/ Reserve Unit	RE	Completes orders and forwards to MPF		Order	HR Specialist Member						P			25	Per month	15										
2.22	AFPC	RE	If disapproved, establishes memo		Memo	HR Specialist Member						P	C		17	Per month	5										
2.23	AFPC	RE	Files copy and forwards to MPF (via e-mail, etc.)		Memo/E-mail	HR Specialist Member						P	C		39	Per month	5			5	Per month						
2.24	MPF	RE	MPF receives retirement orders or disapproval e-mail for filing		Order	HR Specialist Member						P			1	Per week (5 workdays/ week exc. holidays)	15										
2.25	MPF	RE	Contacts member with notice of disapproval		E-mail/Phone	HR Specialist Member						P	C		22	Per month	15										
2.26	MPF	RE	Contacts member with notice of approval and provides order		Order	HR Specialist Member						P	C		22	Per month	15										
2.27	MPF	RE	Schedules follow-up briefing to review separation/retirement documents		E-mail/Phone	HR Specialist Member						P	C		22	Per month	5										
2.28	CSS	CCOA	Receives retirement or separation orders/approval		RIP Orders	Member Commander HR Specialist						P	C		22	Per year	5			5	Per year						
2.29	CSS	CCOA	Provides unit out-processing checklist to member (MPF action for RC)		Form Letter	HR Specialist Member						P	C		22	Per year	10			10	Per year						
2.30	CSS	CCOA	Sets up appointment with first sergeant and commander, if desired			Member						P			22	Per year	15			15	Per year						
2.31	CSS	CCOA	Obtains and files copy of separation/retirement order		AF Fm 2652 AF Fm 2655	HR Specialist						P			22	Per year	5			5	Per year						
2.32	CSS	CCOA	Verifies all evaluations have been written on subordinates, if necessary		SURF	HR Specialist Member						P	C		22	Per year	5			5	Per year						
2.33	CSS	CCOA	Prepares documents needed to out-process		Out-process checklist	HR Specialist						P			22	Per year	10			10	Per year						
2.34	CSS	CCOA	Obtains and prepares certificates, if applicable (MPF or ARPC action for RC)		DD Fm 2542 AF Fm 1344 AF Fm 423 1346 AF Fm 423 AF Fm 953 DD Fm 363 NGB Fm 438 NGB Fm 438A Presidential Letter	HR Specialist						P			22	Per year	30			30	Per year						
2.35	CSS	CCOA	Completes checklist		Form Letter	Member HR Specialist Commander						P			22	Per year	10			10	Per year						
2.36	CSS	CCOA	Forwards documentation to appropriate agency		Various Forms	HR Specialist						P	C		22	Per year	20			20	Per year						

Color Legend: MPF—Green; MAJCOM—Blue; AFSLMO—Brown; AFPC—Purple; CSS—Black

CSTO Data—BA 16 Military Retirement As Is Processes

	Process Information		Process Title	Supporting Process Information				Does It Have an Application With				Predisposition			Manpower Measurement Data (AD)						Manpower Measurement Data (Reserve Unit)						Manpower Measurement Data (ARPC—Reserves/Guard)					
Process Number	Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs, U.S. Codes, DODDs, DODIs)	Source Documents	Customer	MILPDS	PCIII	VMPF	My Pay	DJMS	AF Portal	Call Center/ IVRS	Front Line Support	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	
2.37	CSS	CCQA	Removes member from unit duty roster and personnel locator file			Duty Roster	HR Specialist						P	C		22	Per year	10		18	Per year	10										
2.38	CSS	CCQA	Sets up retirement ceremony, if desired				HR Specialist Member Commander						P			22	Per year	30		18	Per year	30										
2.39	CSS	CCQA	Disposes of the PIF			PIF	HR Specialist Member						P			22	Per year	5		18	Per year	5										
2.40	MPF	RE	Member returns with all documentation			AF Fm 1160 AF Fm 131 AF Fm 526 DD Fm 2656 DD Fm 214 Memo E-mail	HR Specialist Member						P			22	Per month	10					10	Per month								
2.41	MPF	RE	Member briefed				HR Specialist Member						P			22	Per month	30					10	Per month								
2.42	MPF	RE	Prepares final documentation to include DD Fm 214			AF Fm 1160 AF Fm 131 AF Fm 526 DD Fm 2656 DD Fm 214 Memo E-mail	HR Specialist Member		X				P			22	Per month	30														
2.43	MPF	RE	Mails final documents to appropriate agencies			AF Fm 1160 AF Fm 131 AF Fm 526 DD Fm 2656 DD Fm 214 Memo E-mail	HR Specialist						P			20	Per month	30					10	Per month								
2.44	AFPC	DPPR	Agencies receive documentation			AF Fm 1160 AF Fm 131 AF Fm 526 DD Fm 2656 DD Fm 214 Memo E-mail	HR Specialist						P			1,833	Per month	10					10	Per month								
2.45	MPF	RE	Files retirement folder			AF Fm 1160 AF Fm 131 AF Fm 526 DD Fm 2656 DD Fm 214 Memo E-mail	HR Specialist						P			20	Per month	5					10	Per month								
3			RE—Notification for Temporary Disability Retired List (TDRL)/Medical Evaluation Board (MED)/Physical Evaluation Board (PEB)	AFPC/DPPDS ANG/DP ANG/SG AFRC/DPML	AFIs 36-2110 36-2606 36-3209 36-3212 ARPCI 36-3203 ARPCM 36-2603		Yes (AFPC)	No	No	No	No	No	P	C									60 Days									
3.1	MPF	RE	Calculates point credit account reporting systems (RC)			AF Fm 526	Member HR Specialist						P	C		5	Per year	180		10	Per year	180										
3.2	MPF	RE	Receives notification from disability retirements for individual assignment			Message E-mail	Member HR Specialist						P	C		5	Per year	5		10	Per year	5										
3.3	MPF	RE	Notifies member and unit commander			E-mail/Phone	Member HR Specialist Commander						P	C		5	Per year	10		10	Per year	10										

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CSTO Data—BA 16 Military Retirement As Is Processes

Process Information		Process Title	Supporting Process Information				Does It Have an Application With				Predisposition			Manpower Measurement Data (AD)				Manpower Measurement Data (Reserve Unit)				Manpower Measurement Data (ARPC—Reserves/Guard)					
	Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs, DODIs)	Source Documents	Customer	MILPDS	PCIII	VMPF	My Pay	DJMS	AF Portal	Call Center/ IVRS	Front Line Support	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time
Process Number	3.4	MPF	RE	Provides message data to AFPC		Message	HR Specialist						P	C		5	Per year	10		10							Cycle Time
	3.5	MPF	RE	Files in suspense until response is received		Relocation Folder	HR Specialist						P	C		5	Per year	5		5							
	3.6	MPF	RE	Goes to processes retirement		Final Message Retirement File	Member	X				E63	P	C													
	3.7	MPF	RE	Files documents												5	Per year	5									
4			Transfers to the Retired Reserve (unit reserve, IMA, ANG)	HQ ARPC/DPPR	AFI 36-3209 10 USC 12731	AF Fm 131 MSD Letter HYT Letter EK Order AF Fm 526	HR Specialist Member MPF																				6 months
4.1	HQ ARPC	DPPR	Receives application (AF 131, HYT/MSD letter)				HR Specialist Member MPF																	700	Per month	10	
4.2	HQ ARPC	DPPR	Pulls SURF logs in log book				HR Specialist Member MPF																	700	Per month	10	
4.3	HQ ARPC	DPPR	Verifies eligibility				HR Specialist Member MPF																	700	Per month	15	
4.4	HQ ARPC	DPPR	Determines grade				HR Specialist Member MPF																	700	Per month	15	
4.5	HQ ARPC	DPPR	Approves/disapproves retirement				HR Specialist Member MPF																	700	Per month	20	
4.6	HQ ARPC	DPPR	Inputs into MILPDS				HR Specialist Member MPF	X																700	Per month	10	
4.7	HQ ARPC	DPPR	Requests certificates/flags (IMA only)				HR Specialist Member MPF																	100	Per month	5	
4.8	HQ ARPC	DPPR	Distributes order				HR Specialist Member MPF																	700	Per month	5	
5			Retired Pay Cases—Age 60 (unit reserve, IMA, ANG)	HQ ARPC/DPPR	AFI 36-3209 10 USC 12731	AF Fm 131 DD Fm 2656 ARPC Fm 0-69	HR Specialist Member MPF																				5 months
5.1	HQ ARPC	DPPR	Requests age 60 pay roster				HR Specialist Member MPF																	1	Per month	30	
5.2	HQ ARPC	DPPR	Verifies eligibility/determines pay grade				HR Specialist Member MPF																	450	Per month	120	
5.3	HQ ARPC	DPPR	Sends application to member				HR Specialist Member MPF																	450	Per month	30	
5.4	HQ ARPC	DPPR	Receives completed application				HR Specialist Member MPF																	450	Per month	5	

Color Legend: MPF—Green; MAJCOM—Blue; AFSLMO—Brown; AFPC—Purple; CSS—Black

CSTO Data—BA 16 Military Retirement As Is Processes

Process Number	Process Information		Process Title	Supporting Process Information			Customer	Does it Have an Application With				Predisposition				Manpower Measurement Data (AD)				Manpower Measurement Data (ANG)				Manpower Measurement Data (Reserve Unit)				Manpower Measurement Data (ARPC—Reserves/Guard)			
	Level	Work Center		Process Owner	Mandates (to include Public Laws, AFIs, DODIs)	Source Documents		MILPDS	PCIII	VMPF	My Pay	DJMS	AF Portal	Call Center/ IVRS	Front Line Support	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time
5.5	HQ ARPC	DPPR	Reviews application				HR Specialist Member MPF																				450	Per month	15		
5.6	HQ ARPC	DPPR	Requests order				HR Specialist Member MPF																				450	Per month	10		
5.7	HQ ARPC	DPPR	Inputs data to MILPDS				HR Specialist Member MPF	X																			450	Per month	10		
5.8	HQ ARPC	DPPR	Inputs data to DFAS-CL pay system				HR Specialist Member MPF																				450	Per month	15		
5.9	HQ ARPC	DPPR	Requests certificates/flag (IMA)				HR Specialist Member MPF																				450	Per month	15		
5.10	HQ ARPC	DPPR	Distributes order				HR Specialist Member MPF																				450	Per month	10		
5.11	HQ ARPC	DPPR	Distributes pay application to DFAS-CL				HR Specialist Member MPF																				450	Per month	10		
6			Retired Pay Cases—AGR (unit reserve, IMA, ANG, AGR)	HQ ARPC/DPPR	AFI 36-3209 10 USC 8911 10 USC 8914	DD Fm 214 AF Fm 526 DD Fm 2656	HR Specialist Member MPF																								4 months
6.1	HQ ARPC	DPPR	Receives application—AF 1160				HR Specialist Member MPF																				60	Per month	20		
6.2	HQ ARPC	DPPR	Verifies eligibility/approves retirement				HR Specialist Member MPF																				60	Per month	30		
6.3	HQ ARPC	DPPR	Determines pay grade				HR Specialist Member MPF																				60	Per month	30		
6.4	HQ ARPC	DPPR	Determines travel authorization				HR Specialist Member MPF																				60	Per month	5		
6.5	HQ ARPC	DPPR	Sends pay application forms (if not received previously)				HR Specialist Member MPF																				60	Per month	10		
6.6	HQ ARPC	DPPR	Receives completed application				HR Specialist Member MPF																				60	Per month	5		
6.7	HQ ARPC	DPPR	Reviews application				HR Specialist Member MPF																				60	Per month	10		
6.8	HQ ARPC	DPPR	Requests order				HR Specialist Member MPF																				60	Per month	10		

Color Legend: MPF—Green; MAJCOM—Blue; AFSLMO—Brown; AFPC—Purple; CSS—Black

CSTO Data—BA 16 Military Retirement As Is Processes

Process Information		Process Title	Supporting Process Information				Does It Have an Application With				Predisposition			Manpower Measurement Data (AD)				Manpower Measurement Data (Reserve Unit)				Manpower Measurement Data (ARPC—Reserves/Guard)					
			Process Owner	Mandates (to include Public Laws, AFIs, DODIs)	Source Documents	Customer	MILPDS	PCIII	VMPF	My Pay	DJMS	AF Portal	Call Center/ IVRS	Front Line Support	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	
Process Number	Level	Work Center	Tasks			HR Specialist Member MPF	X													60	Per month	10		60	Per month	10	
	HQ ARPC	DPPR	Inputs to MILPDS			HR Specialist Member MPF																					
6.10	HQ ARPC	DPPR	Inputs to DFAS-CL pay system			HR Specialist Member MPF					X									60	Per month	30		60	Per month	30	
6.11	HQ ARPC	DPPR	Requests certificates/flag (IMA)			HR Specialist Member MPF														60	Per month	5		60	Per month	5	
6.12	HQ ARPC	DPPR	Distributes order			HR Specialist Member MPF														60	Per month	10		60	Per month	10	
6.13	HQ ARPC	DPPR	Distributes pay application to DFAS-CL			HR Specialist Member MPF														60	Per month	5		60	Per month	5	
7			Notification Retired Pay At Age 60 Letter (unit reserve, IMA, ANG)	HQ ARPC/DPPR	AFI 36-3209 10 USC 12731	AF Fm 526 Notification Letter	Member MPF TAG																			30 days	
7.1	HQ ARPC	DPPR	Requests roster of potential eligible members			Member MPF TAG														2	Per month	30		2	Per month	30	
7.2	HQ ARPC	DPPR	Verifies eligibility			Member TAG														800	Per month	13		800	Per month	13	
7.3	HQ ARPC	DPPR	Issues official letter to member			Member MPF TAG														800	Per month	10		800	Per month	10	
7.4	HQ ARPC	DPPR	Updates MILPDS			Member MPF TAG	X													800	Per month	5		800	Per month	5	
7.5	HQ ARPC	DPPR	Notifies entitlements branch			Member MPF TAG														800	Per month	1		800	Per month	1	
7.6	HQ ARPC	DPPR	Sends letter to MPR			Member MPF TAG														800	Per month	1		800	Per month	1	
8			RCSBP Annuity Cases (unit reserve, IMA, ANG)	HQ ARPC/DPPR	10 USC 1448	EL Order DD Fm 1883 ARPC Fm 123	Beneficiary DFAS-CL																			15 days	
8.1	HQ ARPC	DPPR	Receives notification of death			Beneficiary DFAS-CL														15	Per month	5		15	Per month	5	
8.2	HQ ARPC	DPPR	Verifies eligibility upon receipt of death certificate			Beneficiary DFAS-CL														15	Per month	60		15	Per month	60	
8.3	HQ ARPC	DPPR	Requests retired pay order (deceased)			Beneficiary DFAS-CL														15	Per month	20		15	Per month	20	
8.4	HQ ARPC	DPPR	Completes template and forwards to DFAS-CL			Beneficiary DFAS-CL														15	Per month	15		15	Per month	15	
8.5	HQ ARPC	DPPR	Distributes order/benefit information to beneficiary			Beneficiary DFAS-CL														15	Per month	20		15	Per month	20	
9			FM—Computes Military Separation/Retirement Payment (T status/V status), BA05 and 16	DFAS PMJCAC 926-7335	DFAS DEM 7073-1 DODFMR 7A	Ret.	N/A	N/A	N/A	N/A	JJAA, JPAM, JPBB, JPBX	30 Days	N/A	N/A				25.63									
9.1	FSO	FMFC	Receives list/orders from MPF and computes pay amount through authorized date			Computer List/Orders	Ret.	N/A	N/A	N/A	JJAA									43.69	Per month	19.16		43.69	Per month	19.16	
9.2	FSO	FMFC	Prepares payment document (DFAS-DE Form 2424) and sends copy of DFAS-DE Form 2424 to Quality Assurance			DFAS-DE 2424	Ret. DFAS-DE	N/A	N/A	N/A	JJAA									43.2	Per month	4.47		43.2	Per month	4.47	
9.3	FSO	FMFC	Forwards payment document to Customer Support for processing			DFAS-DE 2424	Member DFAS-DE	N/A	N/A	N/A	JJAA JDCIII									32.84	Per month	2		32.84	Per month	2	

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CSTO Data—BA 16 Military Retirement As Is Processes

Process Number	Process Information	Process Title	Supporting Process Information			Does It Have an Application With	Predisposition				Manpower Measurement Data (AD)				Manpower Measurement Data (Reserve Unit)				Manpower Measurement Data (ARPC—Reserves/Guard)			
			Process Owner	Mandates (to include Public Laws, AFIs, DODIs)	Source Documents	Customer	MILPDS	PCIII	VMPF	My Pay	DJMS	AF Portal	Call Center/ IVRS	Front Line Support	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes)	Cycle Time
10	Level	Work Center	Tasks	DFAS PMJCAC 926-7335	DFAS DEM 7073-1 DODFMR 7A	Computer List, AF Fm 594, Base FSO Letter, DD Form 1351-2, ECCS MPF	Commander Supervisor Member MPF	N/A	N/A	N/A	30 Days	N/A	N/A	N/A	N/A	N/A	N/A	148.12	N/A	N/A	N/A	N/A
10.1	FSO	FMFC	Receives JTR from MPF and reviews JTR for E5 transaction and establishes Separation Working File (SWF)		Computer List	MPF	N/A	N/A	N/A	N/A	JJAA				31	Per month	8.42					
10.2	FSO	FMFC	Reviews management case files for pending debts or dependency determination		AF Fm 594	Member MPF	N/A	N/A	N/A	N/A	N/A				36.69	Per month	9.66					
10.3	FSO	FMFC	Schedules appointment for member		N/A	Member	N/A	N/A	N/A	N/A	N/A				48.13	Per month	3.3					
10.4	FSO	FMFC	Conducts briefing		Computer List, AF Fm 594, Base FSO Letter, DD Fm 1351-2	Member MPF	N/A	N/A	N/A	N/A	JJAA				23.88	Per month	27.11					
10.5	FSO	FMFC	Reviews and signs out-processing checklist and assists in completing documents		Base FSO Form Letter	Member	N/A	N/A	N/A	N/A	N/A				42.27	Per month	8.64					
10.6	FSO	FMFC	Reviews documents for accuracy and completeness		AF Fm 594	Member	N/A	N/A	N/A	N/A	N/A				48.57	Per month	4.92					
10.7	FSO	FMFC	Codes documents for input		AF Fm 594	Member	N/A	N/A	N/A	N/A	JJAA JDCIII				47.67	Per month	5.27					
10.8	FSO	FMFC	Briefs member on completing final voucher		DD Fm 1351+2	Member	N/A	N/A	N/A	N/A	N/A				32.03	Per month	5.03					
10.9	FSO	FMFC	Reviews travel record for outstanding orders/advances		N/A	Member	N/A	N/A	N/A	N/A	N/A				38.87	Per month	5.16					
10.10	FSO	FMFC	Pulls and reviews folder prior to separation/retirement date		FSO Case Folder	Member MPF	N/A	N/A	N/A	N/A	N/A				42.27	Per month	7.21					
10.11	FSO	FMFC	Reviews record for payment authorization		N/A	Member	N/A	N/A	N/A	N/A	JJAA				43.3	Per month	5.14					
10.12	FSO	FMFC	Pulls DJMS print and manually computes pay authorization (AF Form 350)		AF Fm 350 and Computer Print	Member	N/A	N/A	N/A	N/A	JJAA				40.38	Per month	16.12					
10.13	FSO	FMFC	Verifies E5 transaction was posted to MMPA; if not, sends member to the MPF		N/A	Member MPF	N/A	N/A	N/A	N/A	JJAA				39.41	Per month	3.19					
10.14	FSO	FMFC	Reviews record for payment authorization (10 days prior to Date of Separation [DOS])		N/A	Member	N/A	N/A	N/A	N/A	JJAA				39.73	Per month	5.61					
10.15	FSO	FMFC	Sends payment message to DFAS if NT line is not paid		ECCS Message	Member DFAS	N/A	N/A	N/A	N/A	MAIL				25.74	Per month	5.77					
10.16	FSO	FMFC	Annotates folder and files		FSO Case Folder	Member	N/A	N/A	N/A	N/A	N/A				41.75	Per month	4.06					
10.17	FSO	FMFC	Reviews final travel voucher documentation		DD Fm 1351+2	Member	N/A	N/A	N/A	N/A	N/A				32.67	Per month	4.16					
10.18	FSO	FMFC	Forwards voucher to Customer Support for processing		DD Fm 1351+2	Member	N/A	N/A	N/A	N/A	N/A				31.05	Per month	1.97					
10.19	FSO	FMFC	Follows up retirement/separation file status		Computer List, AF Fm 594, Base FSO Letter, DD Fm 1351-2	Member	N/A	N/A	N/A	N/A	JJAA				41.84	Per month	5.65					
11			FM—Traditional Guard Retirement																			
11.1	MPF		Processes separation transaction																			
11.2	FSO		Checks/adjusts MMPA for outstanding debts																			

CSTO Data—BA 16 Civilian Retirement As Is Processes

Color Legend: MPF—Green; MAJCOM—Blue; AF—Brown; AFPC—Purple; CPF—Black

Process Information			Process Title	Supporting Process Information			Does It Have an Application With					Manpower Measurement Data (AD)			
Process Number	Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs,U.S. Codes, DODDs, DODIs)	Source Documents	Customer	DCPDS	VCPF	My Pay	DFAS	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes); the Time It Takes to Perform the Task Once	Cycle Time
1.5	AFPC	DPC	AFPC/DPC provides marketing and publicity to the field/employees									3	Per month	1,200	
1.6	AFPC	DPC	Maintains BEST Web page									1	Per quarter	6,240	
1.7	AFPC	DPC	Prepares reports and program documentation									4	Per month	480	
1.8	AFPC	DPC	Maintains records and history files									5	Per month	30	
2			Processes Voluntary Contributions to Retirement Fund (for AFPC-serviced bases)	AFPC	AFPC Procedures Guide	SF 2804, OPF/EOPF	Employee					1 per pay period			40-90 minutes
2.1	Employee		Employee inquiries via IVRS												
2.2	AFPC	DPC	Provides advisory/counseling service to employees									1	Per day (5 workdays/week excluding holidays)	20	
2.3	Employee		Employee obtains necessary forms from the Web and mails/faxes to BEST												
2.4	AFPC	DPC	BEST reviews, verifies, certifies, and scans forms into PARIS upon receipt of completed form									1	Per day (5 workdays/week excluding holidays)	35	
2.5	AFPC	DPC	BEST forwards completed form to the Office of Personnel Management (OPM)									1	Per day (5 workdays/week excluding holidays)	10	
2.6	OPM		OPM completes form and provides information directly to employee												
3			Processes Voluntary Civilian Deposits/Redeposits to Retirement Fund (for AFPC-serviced bases)	AFPC	AFPC Procedures Guide	SF 2803, SF 3108, OPF/EOPF	Employee							40 per pay period (does not include counseling only sessions)	45-90 minutes
3.1	Employee		Employee inquiries via IVRS												
3.2	AFPC	DPC	Provides advisory/counseling service to employees									4	Per day (5 workdays/week excluding holidays)	20	
3.3	Employee		Employee obtains necessary forms from the Web and mails/faxes to BEST												
3.4	AFPC	DPC	Completes and certifies agency portion of appropriate form by reviewing hard copy OPF and EOPF									4	Per day (5 workdays/week excluding holidays)	33	
3.5	AFPC	DPC	Faxes or mails form to employee									4	Per day (5 workdays/week excluding holidays)	10	
3.6	AFPC	DPC	Scans form into PARIS									4	Per day (5 workdays/week excluding holidays)	5	
3.7	Employee		Employee completes employee portion and mails form to OPM												
3.8	OPM		Calculates civilian deposit/redeposit amount and provides payment information directly to employee												
3.9	Employee		Employee makes payments directly to OPM												
3.10	OPM		OPM receives payment and provides receipt to employee												
3.11	Employee		Faxes/mails payment in full receipt to AFPC												
3.12	AFPC	DPC	BEST scans into the automated official personnel folder (OPF)									4	Per day (5 workdays/week excluding holidays)	5	
4			Processes Voluntary Military Post-56 Military Deposits (for AFPC-serviced bases)	AFPC	AFPC Procedures Guide	SF 2803, SF 3108, RI 20-97, OPM Fm 1514, OPF/EOPF	Employee				Yes	146 per pay period (does not include counseling only sessions)			1-2 hours
4.1	Employee		Employee inquiries via IVRS												
4.2	AFPC	DPC	Provides advisory/counseling service to employees									15	Per day (5 workdays/week excluding holidays)	23	
4.3	AFPC	DPC	Completes and certifies agency portion of appropriate form by reviewing hard copy OPF and EOPF. Faxes/mails to employee									15	Per day (5 workdays/week excluding holidays)	43	
4.4	Employee		Employee sends the request to the appropriate military finance office to obtain estimated military earnings												
4.5	Mil Finance		Military finance provides appropriate information to employee												
4.6	Employee		Upon receipt of earnings, employee hand-carries or mails all documents to the local civilian payroll office or regional DFAS office, in accordance with local procedures												
4.7	DFAS		DFAS calculates military deposit amount and provides payment information directly to employee l												
4.8	Employee		Makes payments to DFAS												
4.9	Employee		Faxes/mails payment in full receipt to AFPC												
4.10	AFPC	DPC	BEST scans into the automated OPF									15	Per day (5 workdays/week excluding holidays)	5	

CSTO Data—BA 16 Civilian Retirement As Is Processes

CSTO Data—BA 16 Civilian Retirement As Is Processes															
Process Information			Process Title	Supporting Process Information			Does It Have an Application With				Manpower Measurement Data (AD)				
Process Number	Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs,U.S. Codes, DODDs, DODIs)	Source Documents	Customer	DCPDS	VCPF	My Pay	DFAS	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes); the Time It Takes to Perform the Task Once	Cycle Time
4.11	Employee		If USERRA military service, employee faxes earnings to BEST												
4.12	AFPC	DPC	BEST computes two deposit calculations: one based on civilian service and one based on military service									15	Per day (5 workdays/week excluding holidays)	15	
4.13	AFPC	DPC	Provides appropriate computation to the employee for attachment to the military deposit application									15	Per day (5 workdays/week excluding holidays)	10	
4.14	Employee		Upon receipt of earnings, employee hand-carries or mails all documents to the local civilian payroll office or regional DFAS office, in accordance with local procedures												
4.15	DFAS		DFAS calculates military deposit amount and provides payment information directly to employee												
4.16	Employee		Makes payments to DFAS												
4.17	Employee		Faxes/mails payment in full receipt to AFPC												
4.18	AFPC	DPC	BEST scans into the automated OPF									15	Per day (5 workdays/week excluding holidays)	3	
5			Processes Voluntary Refund of Retirement Contributions (for AFPC-served bases)	AFPC	AFPC Procedures Guide	SF 2802, SF 3106, OPF/EOPF	Employee					1 per pay period			45-90 minutes
5.1	Employee		Employee inquiries via IVRS												
5.2	AFPC	DPC	Provides advisory/counseling service to employees									1	Per day (5 workdays/week excluding holidays)	20	
5.3	Employee		Employee obtains necessary forms from the Web and mails/faxes to BEST												
5.3.1	Employee		If within 30 day of separation, faxes/mails completed form to BEST												
5.3.2	AFPC	DPC	Completes and certifies agency portion of appropriate form and scans into EOPF									1	Per day (5 workdays/week excluding holidays)	38	
5.3.3	AFPC	DPC	Forwards forms to DFAS									1	Per day (5 workdays/week excluding Holidays)	10	
5.3.4	DFAS		DFAS processes form and forwards to OPM												
5.3.5	OPM		OPM refunds retirement contributions directly to employee												
5.4	Employee		If greater than 30 days of separation, employee sends request directly to OPM												
5.4.1	OPM		OPM processes and refunds retirement contributions directly to employee												
6			Processes Retirement Estimates and Provides Retirement Counseling (for AFPC-served bases)	AFPC		SF 2801-1/3107-1, OPF/EOPF	Employee					150 per pay period (does not include counseling only sessions)			1.3- 3 hours
6.1	Employee		Employee inquiries via IVRS												
6.2	AFPC	DPC	Provides advisory/counseling service to employees									15	Per day (5 workdays/week excluding holidays)	33	
6.3	AFPC	DPC	If no special situations, BEST directs employee to EBIS or IVRS system to acquire a retirement estimate									15	Per day (5 workdays/week excluding holidays)	5	
6.3.1	AFPC	DPC	If special situation, prepares estimate using GRB program and faxes/mails to employee									15	Per day (5 workdays/week excluding holidays)	83	
6.4	AFPC	DPC	Captures employee's retirement estimate request in workload tracking system									15	Per day (5 workdays/week excluding holidays)	15	
7			Processes Voluntary Retirements (for AFPC-served bases)	AFPC	AFPC Procedures Guide	SF 2801, SF 2801-1, SF 2801D, SF 2810, SF 2818, SF 2819, SF 2821, SF 3107-1, OPF/EOPF	Employee					84 per pay period			3.8-11.9 hours
7.1	Employee		Employee inquiries via IVRS												
7.2	AFPC	DPC	Provides advisory/counseling service to employees									8	Per day (5 workdays/week excluding holidays)	45	
7.3	Employee		Employee obtains necessary forms from the Web												
7.4	Employee		Employee completes application and request for personnel action (RPA) and forwards to BEST												
7.5	AFPC	DPC	BEST forwards acknowledgement letter to employee upon receipt of retirement package									8	Per day (5 workdays/week excluding holidays)	25	
7.6	CPF		CPF forwards electronic RPA to BEST												
7.7	AFPC	DPC	BEST verifies eligibility for retirement and completes forms (includes certified summary and employee letter)									8	Per day (5 workdays/week excluding holidays)	5	
7.7.1	AFPC	DPC	If break in service and/or FICA service, sends request to OPM for verification									8	Per day (5 workdays/week excluding holidays)	58	
													Per day (5 workdays/week excluding holidays)	5	

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CSTO Data—BA 16 Civilian Retirement As Is Processes

Process Information			Process Title	Supporting Process Information			Does It Have an Application With				Manpower Measurement Data (AD)				
Process Number	Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs,U.S. Codes, DODDs, DODIs)	Source Documents	Customer	DCPDS	VCPF	My Pay	DFAS	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes); the Time It Takes to Perform the Task Once	Cycle Time
7.7.1.1	OPM		OPM verifies and sends back to BEST									8	Per day (5 workdays/week excluding holidays)	58	
7.7.2	AFPC	DPC	Completes manual retirement estimate. If employee is covered under special retirement provisions, completes letter certifying special service												
7.8	AFPC	DPC	Mails information to employee									8	Per day (5 workdays/week excluding holidays)	10	
7.9	AFPC	DPC	BEST follows up with employee or CPF on missing documentation and/or RPA (as applicable)									8	Per day (5 workdays/week excluding holidays)	10	
7.10	AFPC	DPC	BEST retrieves FEGLI and FEHB documents from hard copy OPF and EOPF to forward with retirement package. Completes forms if applicable									8	Per day (5 workdays/week excluding holidays)	33	
7.11	AFPC	DPC	BEST completes Agency Checklist									8	Per day (5 workdays/week excluding holidays)	13	
7.12	AFPC	DPC	BEST copies retirement case file and certain documents the employee may need after retirement									8	Per day (5 workdays/week excluding holidays)	15	
7.13	AFPC	DPC	If receiving VSIP, BEST verifies amount									8	Per day (5 workdays/week excluding holidays)	10	
7.14	AFPC	DPC	BEST processes RPA. If receiving VSIP, sends Remedy ticket to payroll									8	Per day (5 workdays/week excluding holidays)	15	
7.15	AFPC	DPC	BEST files SF-52, signed by employee, on the right side of OPF									8	Per day (5 workdays/week excluding holidays)	1	
7.16	AFPC	DPC	BEST forwards completed retirement package through DFAS to OPM									8	Per day (5 workdays/week excluding holidays)	20	
7.17	AFPC	DPC	BEST mails employee retirement SF-50 and letter giving time frame for retirement process/annuity payment and OPM telephone numbers. Includes updated retirement estimate, if applicable									8	Per day (5 workdays/week excluding holidays)	10	
7.18	AFPC	DPC	Refers CPF/Management to the Civilian Servicing Unit (CSU) application for length of service for retirement certificate									8	Per day (5 workdays/week excluding holidays)	5	
7.19	CPF/MGR		Prepares retirement certificate									8	Per day (5 workdays/week excluding holidays)	2	
7.20	AFPC	DPC	BEST queries DCPDS to ensure employee is an "ex-employee" and no longer in DCPDS									8	Per day (5 workdays/week excluding holidays)	10	
7.21	AFPC	DPC	BEST returns OPF to AFPC/DPCMP for forwarding to the National Personnel Records Center (NPRC)									8	Per day (5 workdays/week excluding holidays)	1	
7.22	AFPC	DPC	BEST scans retirement case file to administrative area of PARIS									8	Per day (5 workdays/week excluding holidays)	15	
7.23	AFPC	DPC	BEST provides assistance to retired employees for 120 days or until placed in an interim pay status by OPM									8	Per day (5 workdays/week excluding holidays)	60	
7.24	AFPC	DPC	BEST responds to follow-on inquiries from OPM regarding employee's retirement									8	Per day (5 workdays/week excluding holidays)	60	
8			Processes Disability Retirements (for AFPC-serviced bases)	AFPC	AFPC Procedures Guide	SF 3112 A-E, SF2801/3107, SF 2801-1/3107-1, SF 2810, SF 2801-D/3107-D, SF 2821, SF 2819, OPF/EOPF	Employee	Yes		Yes	Yes	10 per pay period			5-13 hours
8.1	Employee		Employee inquiries via IVRS												
8.2	AFPC	DPC	Provides advisory/counseling service to employees									1	Per day (5 workdays/week excluding holidays)	53	
8.3	Employee		Employee obtains necessary forms from the Web or CPF/Manager												
8.4	Employee		Employee completes his or her portion of the disability/optional retirement application												
8.5	Employee Doctor		Obtains medical documentation to support application												
8.6	Employee Supervisor		Obtains supervisor's statement												
8.7	Employee		Submits completed retirement application to the CPF												
8.8	CPF		CPF reviews disability retirement application				Employee and Supervisor					1	Per day (5 workdays/week excluding Holidays)	60	

CSTO Data—BA 16 Civilian Retirement As Is Processes

CSTO Data—BA 16 Civilian Retirement As Is Processes															
Process Information			Process Title	Supporting Process Information			Does It Have an Application With			Manpower Measurement Data (AD)					
Process Number	Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs,U.S. Codes, DODDs, DODIs)	Source Documents	Customer	DCPDS	VCPF	My Pay	DFAS	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes); the Time It Takes to Perform the Task Once	Cycle Time
8.8.1	CPF		If the disability can be accommodated, application usually does not require further action. Employee can still apply—only OPM has authority to disapprove									1	Per day (5 workdays/week excluding holidays)	240	
8.8.2	CPF		If the disability cannot be accommodated, CPF completes package, mails to BEST, and submits electronic RPA									1	Per day (5 workdays/week excluding holidays)	130	
8.9	AFPC	DPC	Forwards acknowledgement letter to employee upon receipt of retirement package				CPF	Yes				1	Per day (5 workdays/week excluding holidays)	25	
8.10	AFPC	DPC	Completes agency portion of initial disability retirement package; times covered in other tasks	AFPC								1	Per day (5 workdays/week excluding holidays)	35	
8.11	AFPC	DPC	Ensures all forms are complete and verifies eligibility for retirement	AFPC								1	Per day (5 workdays/week excluding holidays)	58	
8.11.1	AFPC	DPC	If break in service and/or FICA service, sends request to OPM for verification of refunded service									1	Per day (5 workdays/week excluding holidays)	5	
8.11.2	OPM		OPM verifies and sends back to BEST									1	Per day (5 workdays/week excluding holidays)		
8.11.3	AFPC	DPC	Completes disability retirement estimate									1	Per day (5 workdays/week excluding holidays)	58	
8.11.4	AFPC	DPC	If employee is covered under special retirement provisions, completes letter certifying special service									1	Per day (5 workdays/week excluding holidays)	8	
8.11.5	AFPC	DPC	Mails employee documentation and retirement estimate									1	Per day (5 workdays/week excluding holidays)	10	
8.12	AFPC	DPC	Follows up with employee or CPF on missing documentation and/or RPA (as applicable)	AFPC			OPM					1	Per day (5 workdays/week excluding holidays)	10	
8.13	AFPC	DPC	Completes Agency and Disability Retirement Checklist	AFPC								1	Per day (5 workdays/week excluding holidays)	15	
8.14	AFPC	DPC	BEST copies retirement case file and certain documents the employee may need after retirement	AFPC			Employee/CPF					1	Per day (5 workdays/week excluding holidays)	25	
8.15	AFPC	DPC	Forwards initial disability retirement application through DFAS to OPM	AFPC								1	Per day (5 workdays/week excluding holidays)	20	
8.16	OPM		Notifies employee of approval/disapproval									1	Per day (5 workdays/week excluding holidays)		
8.17	AFPC	DPC	BEST sets suspense to follow up on the application pending approval by OPM	AFPC/DFAS/OPM								1	Per day (5 workdays/week excluding holidays)	5	
8.18	AFPC	DPC	If application is approved, completes final disability retirement processing	AFPC								1	Per day (5 workdays/week excluding holidays)	30	
8.18.1	AFPC	DPC	Upon receipt of OPM approval decision letter, BEST notifies the CPF of approval or disapproval (employee notified by OPM). Obtains last day of pay from CPF for approved disability retirements	AFPC								1	Per day (5 workdays/week excluding holidays)	25	
8.18.1.1	AFPC	DPC	BEST sets suspense for processing date for employees electing to exhaust sick leave prior to separation	AFPC			CPF					1	Per day (5 workdays/week excluding holidays)	3	
8.18.1.2	AFPC	DPC	Completes, if applicable, SF 2810, SF 2821, SF 2819. Retrieves from hard copy OPF and EOFP all FEHB and FEGLI documents and includes in final disability retirement package	AFPC								1	Per day (5 workdays/week excluding holidays)	33	
8.18.1.3	AFPC	DPC	BEST processes RPA	AFPC								1	Per day (5 workdays/week excluding holidays)	10	
8.18.1.4	AFPC	DPC	BEST forwards completed final disability package through DFAS to OPM	AFPC				Yes				1	Per day (5 workdays/week excluding holidays)	20	
8.18.1.5	AFPC	DPC	BEST mails employee retirement SF-50 and letter giving time frame for retirement process/annuity payment and OPM telephone numbers. Includes updated retirement estimate, if applicable	AFPC/DFAS/OPM								1	Per day (5 workdays/week excluding holidays)	10	
8.18.1.6	AFPC	DPC	BEST copies retirement case file and certain documents the employee may need after retirement	AFPC								1	Per day (5 workdays/week excluding holidays)	15	
8.18.2	AFPC	DPC	If application is disapproved, BEST maintains copy for 45 days pending employee's request for reconsideration	AFPC								1	Per day (5 workdays/week excluding holidays)	3	
8.18.2.1	AFPC	DPC	If employee does not file for reconsideration, scans the application and disapproval letter into the administrative area of PARIS									1	Per day (5 workdays/week excluding holidays)	10	
8.19	AFPC	DPC	BEST queries DCPDS to ensure employee is an "ex-employee" and no longer in DCPDS	AFPC								1	Per day (5 workdays/week excluding holidays)	10	
8.20	AFPC	DPC	BEST returns OPF to AFPC/DPCMP for forwarding to the National Personnel Records Center (NPRC)	AFPC				Yes				1	Per day (5 workdays/week excluding holidays)	1	

Color Legend: MPF—Green; MAJCOM—Blue; AF—Brown; AFPC—Purple; CPF—Black

CSTO Data—BA 16 Civilian Retirement As Is Processes

Process Information			Process Title		Supporting Process Information			Does It Have an Application With				Manpower Measurement Data (AD)			
Process Number	Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs,U.S. Codes, DODDs, DODIs)	Source Documents	Customer	DCPDS	VCPF	My Pay	DFAS	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes); the Time It Takes to Perform the Task Once	Cycle Time
8.21	AFPC	DPC	Scans retirement case file to administrative area of PARIS	AFPC								1	Per day (5 workdays/week excluding holidays)	15	
8.22	AFPC	DPC	Provides assistance to retired employees for 120 days or until placed in an interim pay status by OPM	AFPC								1	Per day (5 workdays/week excluding holidays)	60	
8.23	AFPC	DPC	BEST responds to follow-on inquiries from OPM regarding employee's retirement	AFPC								1	Per day (5 workdays/week excluding holidays)	60	
8.24	AFPC	DPC	Refers CPF/Management to the CSU application for length of service for retirement certificate	AFPC								1	Per day (5 workdays/week excluding holidays)	5	
8.25	CPF/ Manager		Prepares retirement certificate									1	Per day (5 workdays/week excluding holidays)	2	
9			Processes Discontinued Service Retirement (DSR) (Involuntary Separations: Reduction-in-Force, Non-Disciplinary Actions) (for AFPC-serviced bases)	AFPC	AFPC Procedures Guide	SF 2801/3107, SF 2801-1/3107-1, SF 2801-D/3107-D, SF 2821, SF 2819, SF 2818 OPM 1510, OPF/EOPF	Employee	Yes		Yes	Yes	5 per pay period			3.8-12.5 hours
9.1	Employee		Employee inquires via IVRS												
9.2	AFPC	DPC	Provides advisory/counseling service to employees									1	Per day (5 workdays/week excluding holidays)	45	
9.3	Employee		Employee obtains necessary retirement application forms from the Web												
9.4	Employee		Employee completes retirement application and forwards to BEST												
9.5	AFPC	DPC	BEST forwards acknowledgement letter to employee upon receipt of retirement package									1	Per day (5 workdays/week excluding holidays)	25	
9.6	AFPC	DPC	At CPF's request, BEST reviews hard copy OPF and EOPF to determine retirement eligibility. Forwards information to CPF									1	Per day (5 workdays/week excluding holidays)	38	
9.7	CPF		CPF forwards electronic Request for Personnel Action (RPA) with supporting documentation									1	Per day (5 workdays/week excluding holidays)	15	
9.8	AFPC	DPC	BEST completes and verifies eligibility for retirement									1	Per day (5 workdays/week excluding holidays)	58	
9.8.1	AFPC	DPC	If break in service and/or FICA service, sends request to OPM for verification of refunded service and/or deposits/redeposits									1	Per day (5 workdays/week excluding holidays)	5	
9.8.1.1	OPM		OPM verifies and sends back to BEST												
9.8.2	AFPC DFAS	DPC	Completes retirement estimate. If employee is covered under special retirement provisions, completes letter certifying special service. Mails employee documentation									1	Per day (5 workdays/week excluding holidays)	63	
9.9	AFPC	DPC	Follows up with employee or CPF on missing documentation and/or RPA (as applicable)	AFPC								1	Per day (5 workdays/week excluding holidays)	10	
9.10	AFPC	DPC	BEST retrieves FEGLI and FEHB documents from hard copy OPF and EOPF to forward with retirement package. Completes forms if applicable	AFPC								1	Per day (5 workdays/week excluding holidays)	33	
9.11	AFPC	DPC	BEST completes Agency Checklist	AFPC								1	Per day (5 workdays/week excluding holidays)	13	
9.12	AFPC	DPC	BEST copies retirement case file and certain documents the employee may need after retirement	AFPC								1	Per day (5 workdays/week excluding holidays)	15	
9.13	AFPC	DPC	BEST processes RPA	AFPC				Yes				1	Per day (5 workdays/week excluding holidays)	10	
9.14	AFPC	DPC	BEST files hard copy SF-52, signed by employee, on the right side of OPF	AFPC								1	Per day (5 workdays/week excluding holidays)	1	
9.15	AFPC DFAS	DPC	BEST forwards completed retirement package through DFAS to OPM	AFPC								1	Per day (5 workdays/week excluding holidays)	20	
9.16	OPM		OPM processes retirement application												
9.17	AFPC	DPC	BEST mails employee retirement SF-50 and letter giving time frame for retirement process/annuity payment and OPM telephone numbers. Includes updated retirement estimate, if applicable	AFPC/ DFAS/OPM								1	Per day (5 workdays/week excluding holidays)	10	
9.18	AFPC	DPC	BEST queries DCPDS to ensure employee is an "ex-employee" and no longer in DCPDS	AFPC				Yes				1	Per day (5 workdays/week excluding holidays)	10	
9.19	AFPC	DPC	BEST returns OPF to AFPC/DPC/MP for forwarding to the NPRC	AFPC								1	Per day (5 workdays/week excluding holidays)	1	

CSTO Data—BA 16 Civilian Retirement As Is Processes

Color Legend: MPF—Green; MAJCOM—Blue; AF—Brown; AFPC—Purple; CPF—Black

Process Information			Process Title	Supporting Process Information				Does It Have an Application With				Manpower Measurement Data (AD)			
Process Number	Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs,U.S. Codes, DODDs, DODIs)	Source Documents	Customer	DCPDS	VCPF	My Pay	DFAS	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes); the Time It Takes to Perform the Task Once	Cycle Time
9.20	AFPC	DPC	BEST scans retirement case file into administrative area of PARIS	AFPC								1	Per day (5 workdays/week excluding holidays)	15	
9.21	AFPC	DPC	BEST provides assistance to retired employees for 120 days or until placed in an interim pay status by OPM	AFPC								1	Per day (5 workdays/week excluding holidays)	60	
9.22	AFPC	DPC	BEST responds to follow-on inquiries from OPM regarding employee's retirement	AFPC								1	Per day (5 workdays/week excluding holidays)	60	
9.23	AFPC	DPC	Refers CPF/Management to the Civilian Servicing Unit (CSU) application for length of service for retirement certificate									1	Per day (5 workdays/week excluding holidays)	5	
9.24	CPF/ Manager		Prepares retirement certificate									1	Per day (5 workdays/week excluding holidays)	2	
10			Processes Voluntary Early Retirements (VERA) and Voluntary Separation Incentive Payment (VSIP) (for AFPC-serviced bases)	AFPC	AFPC Procedures Guide	SF 2801-1/3107-1, SF 2801/3107, SF 2801-D/3107-D, SF 2821, SF 2819, SF 2818, OPF/EOPF	Employee	Yes		Yes	Yes	11 per pay period			4-13 hours
10.1	CPF		CPF surveys employees to determine interest in applying for VERA and/or VSIP				CPF/Employee					1	Per day (5 workdays/week excluding holidays)	360	
10.2	Employee		Employees notify CPF of their interest												
10.3	CPF		CPF sends request to BEST to determine employee retirement eligibility and if employee had received prior severance pay				CPF					1	Per day (5 workdays/week excluding holidays)	15	
10.4	AFPC	DPC	BEST reviews to determine retirement eligibility and reviews OPF's for prior receipt of severance pay. Completes spreadsheet with retirement eligibility information and whether the employee received prior severance pay									1	Per day (5 workdays/week excluding holidays)	38	
10.5	Employee		Employee inquiries via IVRS												
10.6	AFPC	DPC	Provides advisory/counseling service to employees									1	Per day (5 workdays/week excluding holidays)	45	
10.7	Employee		Employee obtains necessary forms from the Web and mails completed retirement application to BEST				Employee								
10.8	AFPC	DPC	BEST forwards acknowledgement letter to employee upon receipt of retirement package					Yes				1	Per day (5 workdays/week excluding holidays)	25	
10.9	AFPC	DPC	BEST receives electronic RPA from CPF. Receives VERA/VSIP approvals and if receiving VSIP, VSIP payment option from CPF									1	Per day (5 workdays/week excluding holidays)	8	
10.9.1	AFPC	DPC	BEST completes and verifies eligibility for retirement									1	Per day (5 workdays/week excluding holidays)	58	
10.9.1.1	AFPC	DPC	If break in service and/or FICA service, sends request to OPM for verification of refunded service and/or deposits/redeposits if documentation not available									1	Per day (5 workdays/week excluding holidays)	5	
10.9.2	OPM		OPM verifies and sends back to BEST												
10.10	AFPC	DPC	If employee is covered under special retirement provisions, completes letter certifying special service. Completes manual retirement estimate. Mails employee eligibility letter, certified summary of service, and retirement estimate									1	Per day (5 workdays/week excluding holidays)	63	
10.11	AFPC	DPC	BEST follows up with employee or CPF on missing documentation and/or RPA (as applicable)									1	Per day (5 workdays/week excluding holidays)	10	
10.12	AFPC	DPC	BEST completes agency portion of retirement package									1	Per day (5 workdays/week excluding holidays)	38	
10.13	AFPC	DPC	BEST retrieves FEGLI and FEHB documents from hard copy OPF and EOPF to forward with retirement package. Completes forms if applicable									1	Per day (5 workdays/week excluding holidays)	33	
10.14	AFPC	DPC	BEST completes Agency Checklist									1	Per day (5 workdays/week excluding holidays)	13	
10.15	AFPC	DPC	BEST copies retirement case file and certain documents the employee may need after retirement									1	Per day (5 workdays/week excluding holidays)	15	
10.16	AFPC	DPC	If receiving VSIP, BEST verifies amount									1	Per day (5 workdays/week excluding holidays)	10	
10.17	AFPC	DPC	BEST processes RPA. Sends Remedy ticket to DFAS if receiving VSIP					Yes				1	Per day (5 workdays/week excluding holidays)	15	
10.18	AFPC	DPC	BEST files hard copy SF-52, signed by employee, on the right side of OPF									1	Per day (5 workdays/week excluding holidays)	1	

CSTO Data—BA 16 Civilian Retirement As Is Processes

Color Legend: MPF—Green; MAJCOM—Blue; AF—Brown; AFPC—Purple; CPF—Black

Process Information			Process Title	Supporting Process Information				Does It Have an Application With			Manpower Measurement Data (AD)				
Process Number	Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs,U.S. Codes, DODDs, DODIs)	Source Documents	Customer	DCPDS	VCPF	My Pay	DFAS	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes); the Time It Takes to Perform the Task Once	Cycle Time
10.19	AFPC	DPC	BEST forwards completed retirement package through DFAS to OPM									1	Per day (5 workdays/week excluding holidays)	20	
10.20	OPM		OPM processes retirement application												
10.21	AFPC	DPC	BEST mails employee retirement SF-50 and letter giving time frame for retirement process/annuity payment and OPM telephone numbers. Includes updated retirement estimate. If applicable					Yes				1	Per day (5 workdays/week excluding holidays)	10	
10.22	AFPC	DPC	BEST queries DCPDS to ensure employee is an "ex-employee" and no longer in DCPDS									1	Per day (5 workdays/week excluding holidays)	10	
10.23	AFPC	DPC	BEST returns OPF to AFPC/DPCMP for forwarding to the National Personnel Records Center (NPRC)									1	Per day (5 workdays/week excluding holidays)	1	
10.24	AFPC	DPC	BEST scans retirement case file into administrative area of PARIS									1	Per day (5 workdays/week excluding holidays)	15	
10.25	AFPC	DPC	BEST provides assistance to retired employees for 120 days or until placed in an interim pay status by OPM									1	Per day (5 workdays/week excluding holidays)	60	
10.26	AFPC	DPC	BEST responds to follow-on inquiries from OPM regarding employee's retirement									1	Per day (5 workdays/week excluding holidays)	60	
10.27	AFPC	DPC	Refers CPF/Management to the Civilian Servicing Unit (CSU) application for length of service for retirement certificate									1	Per day (5 workdays/week excluding holidays)	5	
10.28	CPF/Manager		Prepares retirement certificate									1	Per day (5 workdays/week excluding holidays)	2	
11			Processes Mandatory Retirements (for AFPC-serviced bases)	AFPC	AFPC Procedures Guide	SF 2801/3107, SF 2801-1/3107-1, SF 2801-D/3107-D, SF 2821, SF 2819, SF 2818, OPF/EOPF	Employee	Yes		Yes	Yes	1 per pay period			4-11.6 hours
11.1	Manager		Management issues require notification to employee												
11.2	Employee		Employee inquiries via IVRS												
11.3	AFPC	DPC	Provides advisory/counseling service to employees									1	Per day (5 workdays/week excluding holidays)	45	
11.4	Employee		Employee obtains necessary retirement application forms from the Web												
11.5	AFPC		BEST confirms CPF is aware of the mandatory retirement									1	Per day (5 workdays/week excluding holidays)	10	
11.6	Employee		Employee completes application and request for personnel action (RPA) and forwards to BEST												
11.7	AFPC	DPC	BEST forwards acknowledgement letter to employee upon receipt of retirement package									1	Per day (5 workdays/week excluding holidays)	25	
11.8	CPF		CPF forwards electronic RPA to BEST									1	Per day (5 workdays/week excluding holidays)	5	
11.9	AFPC	DPC	BEST verifies eligibility for retirement and completes forms									1	Per day (5 workdays/week excluding holidays)	58	
11.9.1	AFPC	DPC	If break in service and/or FICA service, sends request to OPM for verification									1	Per day (5 workdays/week excluding holidays)	5	
11.9.1.1	OPM		OPM verifies and sends back to BEST												
11.9.2	AFPC	DPC	Completes manual retirement estimate. If employee is covered under special retirement provisions, completes letter certifying special service									1	Per day (5 workdays/week excluding holidays)	58	
11.10	AFPC	DPC	Mails information to employee									1	Per day (5 workdays/week excluding holidays)	10	
11.11	AFPC	DPC	BEST follows up with employee or CPF on missing documentation and/or RPA (as applicable)									1	Per day (5 workdays/week excluding holidays)	10	
11.12	AFPC	DPC	BEST completes agency portion of retirement package									1	Per day (5 workdays/week excluding holidays)	38	
11.13	AFPC	DPC	BEST retrieves FEGLI and FEHB documents from hard copy OPF and EOPF to forward with retirement package. Completes forms if applicable									1	Per day (5 workdays/week excluding holidays)	33	
11.14	AFPC	DPC	BEST completes Agency Checklist					Yes				1	Per day (5 workdays/week excluding holidays)	13	
11.15	AFPC	DPC	BEST copies retirement case file and certain documents the employee may need after retirement									1	Per day (5 workdays/week excluding holidays)	15	
11.16	AFPC	DPC	If receiving VSIP, BEST verifies amount. Not applicable on Mandatory Retirement					Yes				1	Per day (5 workdays/week excluding holidays)	10	
11.17	AFPC	DPC	BEST processes RPA									1	Per day (5 workdays/week excluding holidays)	10	

Color Legend: MPF—Green; MAJCOM—Blue; AF—Brown; AFPC—Purple; CPF—Black

CSTO Data—BA 16 Civilian Retirement As Is Processes

Process Information			Process Title	Supporting Process Information				Does It Have an Application With			Manpower Measurement Data (AD)				
Process Number	Level	Work Center	Tasks	Process Owner	Mandates (to include Public Laws, AFIs,U.S. Codes, DODDs, DODIs)	Source Documents	Customer	DCPDS	VCPF	My Pay	DFAS	Number of Occurrences	Frequency	Per Accomplishment Time (in minutes); the Time It Takes to Perform the Task Once	Cycle Time
11.18	AFPC	DPC	BEST files SF-52, signed by employee, on the right side of OPF									1	Per day (5 workdays/week excluding holidays)	1	
11.19	AFPC DFAS OPM	DPC	BEST forwards completed retirement package through DFAS to OPM									1	Per day (5 workdays/week excluding holidays)	20	
11.20	AFPC	DPC	BEST mails employee retirement SF-50 and letter giving time frame for retirement process/annuity payment and OPM telephone numbers. Includes updated retirement estimate, if applicable									1	Per day (5 workdays/week excluding holidays)	10	
11.21	AFPC	DPC	Refers CPF/Management to the Civilian Servicing Unit (CSU) application for length of service for retirement certificate									1	Per day (5 workdays/week excluding holidays)	5	
11.22	CPF/MGR		Prepares retirement certificate									1	Per day (5 workdays/week excluding holidays)	2	
11.23	AFPC	DPC	BEST queries DCPDS to ensure employee is an "ex-employee" and no longer in DCPDS									1	Per day (5 workdays/week excluding holidays)	10	
11.24	AFPC	DPC	BEST returns OPF to AFPC/DPCMP for forwarding to the National Personnel Records Center (NPRC)									1	Per day (5 workdays/week excluding holidays)	1	
11.25	AFPC	DPC	BEST scans retirement case file to administrative area of PARIS									1	Per day (5 workdays/week excluding holidays)	15	
11.26	AFPC	DPC	BEST provides assistance to retired employees for 120 days or until placed in an interim pay status by OPM									1	Per day (5 workdays/week excluding holidays)	60	
11.27	AFPC	DPC	BEST responds to follow-on inquiries from OPM regarding employee's retirement									1	Per day (5 workdays/week excluding holidays)	60	
12			Processes Federal Erroneous Retirement Coverage Corrections Act (FERCCA) or Retirement Coverage Errors (for AFPC-serviced bases)	AFPC	AFPC Procedures Guide		Employee	Yes		Yes	Yes	5 per pay period			5.75 hours
12.1	Employee		Employee inquiries via IVRS												
12.2	AFPC	DPC	Provides advisory/counseling service to employees									1	Per day (5 workdays/week excluding holidays)	45	
12.3	AFPC	DPC	Reviews OPF and EOPE, completes appropriate forms, and identifies error									1	Per day (5 workdays/week excluding holidays)	120	
12.3.1	AFPC	DPC	If FERCCA, reports error through e-mail to Air Staff, providing pertinent personal data and error description									1	Per day (5 workdays/week excluding holidays)	30	
12.3.1.1	AF		Air Staff forwards information to the FERCCA Review Board									1	Per day (5 workdays/week excluding holidays)	30	
12.3.1.2	AF		FERCCA Review Board makes determination regarding error and provides corrective action to BEST									1	Per day (5 workdays/week excluding holidays)	10	
12.3.1.3	AFPC	DPC	BEST reviews decision and verifies; notifies employee and provides counseling									1	Per day (5 workdays/week excluding holidays)	60	
12.3.1.4	AFPC	DPC	BEST corrects record in accordance with FERCCA instructions and faxes supporting documentation to DFAS for correction to payroll record									1	Per day (5 workdays/week excluding holidays)	90	
12.3.1.5	DFAS		DFAS makes correction to payroll record												
12.3.2	AFPC	DPC	If non-FERCCA, follows explicit procedures outlined by OPM to determine if employee is "deemed" FERS or if error must be corrected. Counsels employee. Processes retirement code correction to record. Faxes supporting documentation to DFAS for correction									1	Per day (5 workdays/week excluding holidays)	180	
12.3.2.1	DFAS		DFAS makes correction to payroll record												

Key

- DFAS Level of Effort Not Available
- OPM Level of Effort Not Available

Annex B. Retirements Data Elements

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
Accession Processing Location	Y	Y	Y	C	
Action Suspense Date	Y	Y	Y	C	
Active Duty Accession Date	Y	Y	Y	Y	
Active Duty Gain Date	Y	Y	Y	Y	
Active Duty Release Date	Y	Y	Y	Y	
Active Federal Military Service Base Date	Y	Y	Y	Y	
Address: Allotment Address	Y	N	Y	Y	
Address: Current Residence	Y	Y	Y	Y	
Address: Future Mailing Address	Y	Y	Y	Y	
Address: Future Mailing Address Start Date	Y	Y	Y	Y	
Address: Home of Record	Y	Y	Y	Y	
Address: Legal Residence State	Y	Y	Y	Y	
Address: Mailing Address	Y	Y	Y	Y	
Address: Member Current Residence	Y	Y	Y	Y	
Address: Organization	Y	Y	Y	Y	
Address: Residence	Y	Y	Y	Y	
Agreement Benefit Type	Y	N	Y	Y	
Agreement Status	Y	N	Y	C	
Agreement Status Date	Y	N	Y	C	
Allotment Account Number	Y	N	Y	Y	
Allotment Amount	Y	N	Y	Y	
Allotment Designee Full Legal Name	Y	N	Y	C	
Allotment Term	Y	N	Y	C	
Application Identifier	Y	Y	Y	C	
Application Status Date	Y	Y	Y	Y	
Application Status Type	Y	Y	Y	Y	
Application Type	Y	Y	Y	Y	
Assigned (Home) Duty Actual Start Date	Y	Y	Y	Y	
Assigned (Home) Duty Actual Stop Date	Y	Y	Y	Y	
Assigned (Home) Duty Name	Y	N	Y	C	
Assigned (Home) Duty Title	Y	Y	Y	C	
Assigned (Home) Duty Unit Identification Code	Y	Y	Y	C	
Assigned (Home) Duty Unit Location Geo-location	Y	Y	Y	C	
Assigned (Home) Major Command Code	Y	Y	Y	C	
Assigned (Home) Organization Name	Y	Y	Y	Y	
Assigned (Home) Unit Arrival Date	Y	Y	Y	Y	
Assigned (Home) Unit Identification Code (UIC, RUC, PAS)	Y	Y	Y	C	
Assigned (Home) Unit Identification Code (UIC, RUC, PAS) Projected Loss Date	Y	Y	Y	C	

* N/A denotes data items that may or may not be available in the COTS products (or MilPDS), but are not necessary (see Remarks)

** Some of the listed DIMHRS data elements are for use in Contracts, as DIMHRS combines Evaluations and Contracts into the same Business Area.

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
Award Authorization Date	Y	Y	Y	Y	
Award Name	Y	Y	Y	Y	
Award Number	Y	Y	Y	C	
Award Type	Y	Y	Y	C	
Badge Name	Y	Y	Y	C	
Badge Type	Y	Y	Y	C	
Beneficiary Coverage for Survivor Benefit Plan	Y	N	Y	Y	
Beneficiary for Unpaid Pay Full Legal Name	Y	N	Y	Y	
Beneficiary For Unpaid Pay Percentage	Y	N	Y	Y	
Beneficiary for Unpaid Pay Relationship	Y	N	Y	Y	
Beneficiary for Unpaid Pay Social Security Number	Y	N	Y	Y	
Casualty Date	Y	Y	Y	C	
Casualty Line of Duty Determination	Y	N	Y	C	
Casualty Line of Duty Determination Results Date	Y	N	Y	C	
Character of Service	Y	Y	Y	C	
Checklist Complete No Later Than Date	Y	N	Y	C	
Checklist Configuration Status	Y	N	Y	C	
Checklist Configuration Status Date	Y	N	Y	C	
Checklist Effective Date	Y	N	Y	C	
Checklist Item Action Scheduled Date and Time	Y	N	Y	C	
Checklist Item Code	Y	N	Y	C	
Checklist Item Complete No Earlier Than Date	Y	N	Y	C	
Checklist Item Configuration Indicator	Y	N	Y	C	
Checklist Item Mandatory Indicator	Y	N	Y	C	
Checklist Item Organization Address	Y	N	Y	C	
Checklist Item Organization Code	Y	N	Y	C	
Checklist Item Status	Y	N	Y	C	
Checklist Item Status Date	Y	N	Y	C	
Checklist Item Status Remarks	Y	N	Y	C	
Checklist Item Type	Y	N	Y	C	
Checklist Status	Y	N	Y	C	
Checklist Status Date	Y	N	Y	C	
Checklist Type	Y	N	Y	C	
Citizenship Status	Y	Y	Y	Y	
Civilian Education Level	Y	Y	Y	Y	
Civilian Education Level Effective Date	Y	Y	Y	Y	
Commission Date	Y	Y	Y	C	
Counseling Date	Y	Y	Y	C	
Counseling Type	Y	Y	Y	C	
Counselor	Y	Y	Y	C	
Creditable Inactive Duty Service For Basic Pay	Y	Y	Y	C	
Creditable Service for Retirement Date	Y	Y	Y	C	
Creditable Service for Retirement Indicator	Y	Y	Y	C	
Creditable Years Of Service For Pay	Y	Y	Y	C	
Current Marriage Location	Y	N	Y	C	

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
Current Total Active Military Service	Y	Y	Y	Y	
Declaration of Montgomery GI Bill (MGIB) Enrollment Date	Y	Y	Y	C	
Dependency Start Date	Y	N	Y	C	
Dependent Overseas Arrival Date	Y	Y	Y	C	
Dependents Authorized/Accompanied Tour Area	Y	Y	Y	C	
Direct Deposit Start Date	Y	N	Y	Y	
Direct Deposit Waiver Start Date	Y	N	Y	Y	
Disability Determination Description	Y	Y	Y	Y	
Disability Start Date	Y	Y	Y	Y	
Discharge Reference Name	Y	N	Y	C	
Discretionary Allotment Type	Y	N	Y	C	
Education Years Completed	Y	Y	Y	Y	
Educational Designator Code	Y	N	Y	C	
End of Current Contract	Y	Y	Y	C	
Enlistment Date	Y	Y	Y	Y	
Enlistment Extension Reason Code	Y	Y	Y	C	
Ethnic Group	Y	Y	Y	Y	
Exempt From Federal Withholding Indicator	Y	N	Y	C	
Expiration Term of Service Date	Y	Y	Y	C	
Extension Expiration Date	Y	Y	Y	C	
Extension Remarks	Y	N	Y	C	
Extension Type	Y	Y	Y	C	
Extraordinary Heroism Indicator	Y	Y	Y	C	
Federal Income Tax Withholding Additional Amount	Y	N	Y	Y	
Federal Income Tax Withholding Deduction Election	Y	N	Y	Y	
Federal Income Tax Withholding Exemption Number	Y	N	Y	Y	
Financial Account Type	Y	N	Y	Y	
Financial Institution Account Number	Y	N	Y	Y	
Financial Institution Name	Y	N	Y	Y	
Financial Institution Routing Number	Y	N	Y	Y	
Gender	Y	Y	Y	Y	
Highest Active Duty Grade	Y	Y	Y	C	
Highest Active Duty Grade Branch	Y	Y	Y	C	
Impact on Mission Accomplishments	Y	N	Y	C	
Incident Location	Y	N	Y	C	
Incident Type	Y	N	Y	C	
Initial Appointment Warrant Officer Date	Y	N	Y	C	
Initial Military Service Obligation (MSO) Stop Date	Y	Y	Y	C	
Involuntary Transition Indicator	Y	N	Y	C	
Key Duties, Tasks and Responsibilities	Y	N	Y	Y	
Leave Recall Phone Number	Y	N	Y	C	
Leave Request: Number of Days Requested	Y	N	Y	C	
Leave Request: Status	Y	N	Y	Y	

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
Leave Request: Status Date	Y	N	Y	Y	
Leave: Account Type	Y	N	Y	C	
Leave: Days Paid on Separation	Y	N	Y	Y	
Leave: Expiration Term Of Service	Y	N	Y	C	
Leave: Final Indicator	Y	N	Y	C	
Leave: Projected Start Date	Y	N	Y	Y	
Leave: Projected Stop Date	Y	N	Y	Y	
Legal Hold Status Indicator	Y	Y	Y	C	
Mandatory Retirement Date	Y	Y	Y	C	
Mandatory Separation Date	Y	Y	Y	C	
Medical Hold Status Indicator	Y	Y	Y	C	
Member Dependent Accompanied Tour Designation	Y	Y	Y	C	
Member Notification Acknowledgement Date	Y	Y	Y	C	
Member Projected Retirement Date	Y	Y	Y	C	
Member Retirement Checkout Status Effective Date	Y	N	Y	C	
Member Retirement Requested Date	Y	Y	Y	Y	
Member Retirement Status	Y	Y	Y	Y	
Member Service Component Status List	Y	Y	Y	C	
Member Training Class/Path Status	Y	N	Y	C	
Member Training Class/Path Status Date	Y	N	Y	C	
Name Change Indicator	Y	Y	Y	C	
Non-Discretionary Allotment Type	Y	N	Y	C	
Notification Date	Y	Y	Y	C	
Notification Method	Y	N	Y	C	
Notification Recipient	Y	N	Y	C	
Notification Text	Y	N	Y	C	
Notification Time	Y	N	Y	C	
Notification Type	Y	N	Y	C	
Number of Years Satisfactory Reserve Service	Y	Y	Y	C	
Obligated Service Type	Y	Y	Y	C	
Obligation Length Quantity	Y	N	Y	C	
Obligation Projected Stop Date	Y	Y	Y	C	
Obligation Start Date	Y	Y	Y	C	
Office Name of Administering Official	Y	N	Y	C	
Officer Obligated Service Reason Code	Y	Y	Y	C	
Officer Service Commitment Stop Date	Y	Y	Y	C	
Order Date	Y	Y	Y	C	
Order Number	Y	Y	Y	C	
Order Status	Y	Y	Y	C	
Order Type	Y	Y	Y	C	
Organization Name	Y	Y	Y	Y	
Overseas Retirement Indicator	Y	N	Y	C	
Pay Grade Projected Date	Y	Y	Y	C	
Pay: Grade	Y	Y	Y	Y	

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
Pay: Grade Effective Date	Y	Y	Y	C	
Pay: Grade Projected	Y	Y	Y	C	
Pay: Type	Y	N	Y	Y	
Pay: Type Amount	Y	N	Y	Y	
Pay: Type Eligibility Start Date	Y	N	Y	Y	
Pay: Type Eligibility Stop Date	Y	N	Y	Y	
Pay: Type Payment Date	Y	N	Y	Y	
Pay: Type Status	Y	N	Y	Y	
Performance Military Bearing and Character	Y	N	Y	C	
Performance Trait Composite Score	Y	N	Y	C	
Performance Trait Professional Knowledge	Y	N	Y	C	
Performance Trait Score	Y	N	Y	C	
Performance Trait Team Work	Y	N	Y	C	
Performance Trait Type	Y	N	Y	C	
Person Birth Date	Y	Y	Y	Y	
Person Casualty Circumstance	Y	N	Y	C	
Person Death Circumstance Type	Y	N	Y	C	
Person Death Location Text	Y	N	Y	C	
Person Dependency Indicator	Y	N	Y	C	
Person Duty Status	Y	Y	Y	C	
Person Duty Status Date	Y	Y	Y	C	
Person Duty Status Type	Y	Y	Y	C	
Person Faith Group	Y	N	Y	C	
Person Family Relationship	Y	N	Y	C	
Person Full Legal Name	Y	Y	Y	Y	
Person Full Legal Name Change Date	Y	Y	Y	C	
Person Government Category	Y	Y	Y	C	
Person Home Telephone Number	Y	Y	Y	Y	
Person Marital Status	Y	Y	Y	Y	
Person Marital Status Date	Y	Y	Y	C	
Person Physical Ranking	Y	N	Y	C	
Person Race	Y	Y	Y	Y	
Person Relationship Role	Y	N	Y	C	
Person Service Occupation Code	Y	Y	Y	Y	
Person Service Occupation Name	Y	Y	Y	Y	
Person Service Occupation Sequence	Y	Y	Y	Y	
Person Signature or Authentication Date	Y	N	Y	C	
Person Signature or Authentication Indicator	Y	N	Y	C	
Person Social Security Number	Y	Y	Y	Y	
Person Uniformed Service Branch	Y	Y	Y	C	
Person Uniformed Service Component Type	Y	Y	Y	C	
Person Work Telephone Number	Y	Y	Y	Y	
Position Line Number	Y	Y	Y	Y	
Position Number	Y	Y	Y	Y	
Position Pay Grade	Y	Y	Y	Y	
Position Role	Y	Y	Y	Y	

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
Position Role Status	Y	N	Y	C	
Position Role Status Comment	Y	N	Y	C	
Position Role Status Effective Date	Y	N	Y	C	
Position Service Occupation Code	Y	N	Y	C	
Position Title	Y	Y	Y	Y	
Position Uniformed Service Branch	Y	Y	Y	C	
Previous Total Active Military Service	Y	N	Y	C	
Previous Total Inactive Military Service	Y	N	Y	C	
Prior Service Status Indicator	Y	Y	Y	C	
Projected Uniformed Service Rank	Y	Y	Y	C	
Projected Uniformed Service Rank Date	Y	Y	Y	C	
Promotion Eligibility Indicator	Y	Y	Y	C	
Promotion Eligibility Status Effective Date	Y	Y	Y	C	
Reenlistment Date	Y	Y	Y	C	
Reenlistment Eligibility Code	Y	Y	Y	C	
Report Period	Y	Y	Y	C	
Requested Retirement Installation	Y	N	Y	C	
Requested Separation Pay Grade	Y	N	Y	C	
Reserve Component Category Code	Y	Y	Y	C	
Reserve Component Initial Entry Date	Y	Y	Y	C	
Reserve Component Ready Reserve Subcategory	Y	Y	Y	C	
Reserve Component Training/Retirement Category (TRC) Designator Code	Y	Y	Y	C	
Reserve Component Training/Retirement Category (TRC) Designator Effective Date	Y	Y	Y	C	
Reserve Retirement Point Cumulative Credit	Y	Y	Y	C	
Reserve/Guard Active Duty Start Date	Y	Y	Y	C	
Reserve/Guard Active Duty Stop Date	Y	Y	Y	C	
Reserve/Guard Inactive Duty Start Date and Time	Y	N	Y	C	
Reserve/Guard Inactive Duty Stop Date and Time	Y	N	Y	C	
Reserve/Guard Inactive Duty Type	Y	N	Y	C	
Reserve/Guard Status	Y	Y	Y	C	
Retired Pay Increase Percentage	Y	N	Y	C	
Retirement Ceremony Desired Indicator	Y	N	Y	C	
Retirement Eligibility Status	Y	Y	Y	C	
Retirement Eligibility Status Effective Date	Y	Y	Y	C	
Retirement Eligibility Status Effective Date	Y	Y	Y	C	
Retirement Entitlement Type	Y	N	Y	C	
Retirement Law Name Text	Y	N	Y	C	
Retirement Notice Of Eligibility Date	Y	N	Y	C	
Retirement Point Qualifying Duty Type	Y	N	Y	C	
Retirement Statement of Understanding Type	Y	N	Y	C	
Retirement Subcategory Name	Y	N	Y	C	
Retirement Subcategory Type	Y	N	Y	C	
Retirement Type	Y	Y	Y	C	
Role Action	Y	N	Y	C	

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
Role Action Sequence Identifier	Y	N	Y	C	
Role Action Status	Y	N	Y	C	
Role Action Status Date And Time	Y	N	Y	C	
Savings Bond Owner's Social Security Number	Y	N	Y	C	
Separation Document Status	Y	N	Y	C	
Separation Document Status Date	Y	N	Y	C	
Separation Document Type	Y	N	Y	C	
Separation Effective Date	Y	Y	Y	C	
Separation Installation	Y	Y	Y	C	
Separation Reason	Y	Y	Y	C	
Separation Type Code	Y	Y	Y	C	
Service members' Group Life Insurance Coverage Amount	Y	Y	Y	C	
State Income Tax Withholding Amount	Y	N	Y	C	
State Income Tax Withholding Deduction Election	Y	N	Y	C	
State Income Tax Withholding Exemption Number	Y	N	Y	C	
Statement Of Understanding Authentication Date	Y	N	Y	C	
Statement of Understanding Comment	Y	N	Y	C	
Stop loss Status	Y	Y	Y	C	
Survivor Benefit Plan (SBP): Beneficiary Address	Y	N	Y	Y	
Survivor Benefit Plan (SBP): Beneficiary Category	Y	N	Y	Y	
Survivor Benefit Plan (SBP): Beneficiary Date Of Birth	Y	N	Y	Y	
Survivor Benefit Plan (SBP): Beneficiary Full Legal Name	Y	N	Y	Y	
Survivor Benefit Plan (SBP): Beneficiary Relationship	Y	N	Y	Y	
Survivor Benefit Plan (SBP): Beneficiary Social Security Number	Y	N	Y	Y	
Test Date	Y	N	Y	C	
Test Name Administered	Y	Y	Y	C	
Total Days of Active Federal Military Service	Y	N	Y	C	
Total Federal Service Date	Y	Y	Y	C	
Total Foreign Service	Y	Y	Y	C	
Total Lost Time	Y	Y	Y	C	
Total Sea Service	Y	N	Y	C	
Total Years Active Commissioned Service	Y	Y	Y	C	
Total Years Of Service	Y	Y	Y	C	
Total Years Of Service Member Concurrence Indicator	Y	N	Y	C	
Training Class/Path Name	Y	N	Y	C	
Transition Action Identifier	Y	N	Y	C	
Transition Action Status Comment	Y	N	Y	C	
Transition Action Status Date	Y	N	Y	C	
Transition Status	Y	N	Y	C	
Transition Status Date	Y	N	Y	C	
Transition Type Name	Y	N	Y	C	

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
Uniformed Service Initial Entry Date	Y	Y	Y	C	
Uniformed Service Rank	Y	Y	Y	C	
Unit Telephone Number	Y	Y	Y	C	
VEAP Contribution Total Amount	Y	Y	Y	C	
Waiver Authority	Y	N	Y	C	
Waiver Pertinent Directive	Y	N	Y	C	
Waiver Reference	Y	N	Y	C	
Waiver Request Reason	Y	Y	Y	C	
Waiver Request Status	Y	Y	Y	C	
Waiver Subject Text	Y	N	Y	C	
Waiver Type	Y	Y	Y	C	
order_prefix	N	Y	Y	C	
order_prefix	N	Y	Y	C	
order_id	N	Y	Y	C	
last_closing_date	N	Y	Y	C	
next_closing_date	N	Y	Y	C	
yr_last_annual_526	N	Y	Y	C	
rec_stat_pcars	N	Y	Y	C	
rec_stat_pcars_prev	N	Y	Y	C	
pcars_rec_ind	N	Y	Y	C	
ret_retention_part_mo_da	N	Y	Y	C	
dt_20_yr_sat_svc_compl	N	Y	Y	C	
oath_dt	N	Y	Y	C	
career_start_date	N	Y	Y	C	
trng_ret_cat_flag	N	Y	Y	Y	
lost_pts_status_date	N	Y	Y	Y	
tafms_yrs_mos_dys	N	Y	Y	C	
tafcs_yrs_mos_dys	N	Y	Y	C	
satis_svc_total	N	Y	Y	C	
pcars_val_flag	N	Y	Y	C	
ret_elig_contr_date	N	Y	Y	C	
rec_conv_flag	N	Y	Y	C	
adverse_action_flag	N	Y	Y	C	
date_pts_hist_from	N	Y	Y	C	
date_pts_hist_to	N	Y	Y	C	
type_act_ad_pt_fld	N	Y	Y	C	
pts_nbr_hist_ad	N	Y	Y	C	
type_act_idt_pt_fld	N	Y	Y	C	
pts_nbr_hist_idt	N	Y	Y	C	
type_act_ids_pt_fld	N	Y	Y	C	
pts_nbr_hist_ids	N	Y	Y	C	
type_act_eci_pt_fld	N	Y	Y	C	
pts_nbr_hist_eci	N	Y	Y	C	
type_act_memb_pt_fld	N	Y	Y	C	
pts_nbr_hist_membership	N	Y	Y	C	
type_act_retire_pt_fld	N	Y	Y	C	

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
pts_nbr_hist_retire	N	Y	Y	C	
type_act_sat_svc_pt_fld	N	Y	Y	C	
satis_svc_lngth_hist	N	Y	Y	C	
qlty_control_pts_hist	N	Y	Y	C	
pts_hist_stat	N	Y	Y	C	
adjust_reason_pr_svc	N	Y	Y	C	
pts_nr_hist_tafcs_prt_yr	N	Y	Y	C	
source_doc_code	N	Y	Y	C	
hist_cat_desig_flag	N	Y	Y	C	
hist_trng_ret_cat_flag	N	Y	Y	C	
svc_hist_code	N	Y	Y	C	
date_from_curr_rr	N	Y	Y	C	
date_to_curr_rr	N	Y	Y	C	
duty_type_curr_rr	N	Y	Y	C	
half_day_code_curr_rr_1	N	Y	Y	C	
eci_course_number	N	Y	Y	C	
eci_course_volume	N	Y	Y	C	
application_type	N	Y	Y	Y	
retirement_application_date	N	Y	Y	C	
special_program_id	N	Y	Y	Y	
retirement_application_remarks	N	Y	Y	C	
heroism_pay_claim_status	N	Y	Y	C	
separation_character_discharge	N	Y	Y	C	
retirement_id	N	Y	Y	C	
spd_tracer	N	Y	Y	C	
separation_action_init_date	N	Y	Y	C	
requested_separation_indicator	N	Y	Y	C	
reserve_retirement_id	N	Y	Y	Y	
special_pay_remarks	N	Y	Y	C	
pas_sep_acc	N	Y	Y	C	
afr_sec_id_sep_acc	N	Y	Y	Y	
yrs_mos_dys_service_pay	N	Y	Y	C	
yrs_mos_dys_active_service	N	Y	Y	Y	
yrs_active_comm_w_o_service	N	Y	Y	Y	
yrs_mos_dys_service_1405	N	Y	Y	Y	
yrs_mos_dys_service_8888_8927	N	Y	Y	Y	
years_service_12733	N	Y	Y	C	
yrs_mos_dys_service_12732	N	Y	Y	C	
release_date	N	Y	Y	C	
arc_commitment_prog	N	Y	Y	Y	
arc_commit_exp_date	N	Y	Y	C	
service_verified	N	Y	Y	Y	
last_verified_date	N	Y	Y	Y	
base_retirement_date	N	Y	Y	Y	
date_initial_afr_retirement	N	Y	Y	Y	
mandatory_cut_off_date	N	Y	Y	Y	

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
pay_terminated	N	Y	Y	Y	
pay_terminated_date	N	Y	Y	Y	
reeval_date_for_last_physical	N	Y	Y	Y	
retirement_physical_exp_date	N	Y	Y	Y	
retirement_status_change_last	N	Y	Y	C	
retirement_stat_chg_last_date	N	Y	Y	Y	
reason_member_was_retired	N	Y	Y	Y	
pay_data_ind	N	Y	Y	C	
pay_packet_mailed	N	Y	Y	C	
date_pay_packet_mailed	N	Y	Y	C	
order_prefix	N	Y	Y	C	
auth_tv_l_ind	N	Y	Y	C	
remarks_1	N	Y	Y	C	
remarks_2	N	Y	Y	C	
remarks_3	N	Y	Y	C	
sbp_pi	N	Y	Y	C	
sbp_dt	N	Y	Y	N	
pay_date	N	Y	Y	N	
res_act_stat_svc_dt	N	Y	Y	C	
eto_29_feb_flag	N	Y	Y	C	
tysd_total_yrs_svc_date	N	Y	Y	N	
service_date_1405	N	Y	Y	C	
retire_date_29_feb_flag	N	Y	Y	N	
plsd_promo_list_svc_dt	N	Y	Y	C	
dierf_29_feb_flag	N	Y	Y	N	
eto	N	Y	Y	C	
dieus_29_feb_flag	N	Y	Y	Y	
anniversary_retire_dt	N	Y	Y	Y	
dos_prev	N	Y	Y	Y	
dos_prev_reason	N	Y	Y	Y	
pay_date_chg_reason	N	Y	Y	C	
yrs_mos_dys_svc_1332	N	Y	Y	Y	
af_svc_date_cont_mark	N	Y	Y	Y	
dierf_dt_initial_rsrv_forces	N	Y	Y	C	
dieus_dt_initial_ent_unf_svc	N	Y	Y	C	
iadt	N	Y	Y	C	
percent_disability	N	Y	Y	C	
va_code_1	N	Y	Y	C	
va_code_2	N	Y	Y	Y	
va_code_3	N	Y	Y	Y	
icd9_code_1	N	Y	Y	Y	
icd9_code_2	N	Y	Y	C	
icd9_code_3	N	Y	Y	C	
saf_memo_date	N	Y	Y	C	
case_id	N	Y	Y	C	
disability_order_pref	N	Y	Y	C	

Retirements*	DIMHRS	MILPDS	Lab Oracle 11i	Lab PeopleSoft 8.8	Remarks**
order_addr	N	Y	Y	C	
lod	N	Y	Y	C	
epts_with_service_aggravation	N	Y	Y	C	
conflict_indicator	N	Y	Y	C	
armed_conflict	N	Y	Y	C	
combat_related	N	Y	Y	C	
instrumentality_of_war	N	Y	Y	C	
competent	N	Y	Y	C	
unemployable	N	Y	Y	C	
special_interest	N	Y	Y	C	
imminent	N	Y	Y	C	
proxy_result	N	Y	Y	C	
dual_act	N	Y	Y	C	
case_id	N	Y	Y	C	
case_status	N	Y	Y	C	
status_date	N	Y	Y	C	
med_fac_nr	N	Y	Y	C	
med_fac_orgn_desig	N	Y	Y	C	
med_fac_loc	N	Y	Y	C	
tdrl_order_address	N	Y	Y	C	
tri_service_designator	N	Y	Y	Y	
grade	N	Y	Y	Y	
scd_civilian_retirement	N	Y	Y	Y	
tour_start_dt	N	Y	Y	Y	
tour_end_dt	N	Y	Y	C	
acdu_status	N	Y	Y	C	
agr_place_ordered_ad	N	Y	Y	C	
stop_loss_date	N	Y	Y	C	
stop_loss_exp_date	N	Y	Y	C	
irr_pts_ad_curr_cal_yr	N	Y	Y	C	
irr_pts_ad_prior_cal_yr	N	Y	Y	Y	
bad_time_start_date	N	Y	Y	Y	
bad_time_stop_date	N	Y	Y	Y	
days_bad_time_charge	N	Y	Y	C	
hyt_waiver_rsn	N	Y	Y	Y	
afr_mand_sep_rsn	N	Y	Y	C	
sel_svc_fy_bd	N	Y	Y	C	
yr_of_rif_bd	N	Y	Y	C	
rif_serb_flag	N	Y	Y	C	

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Annex C. DIMHRS Elements

MILPDS Data Structure	MILPDS Data Item
addl_order_information_i	ORDER_TYPE
addl_order_information_i	ORDER_PREFIX
addl_order_information_i	ORDER_DATE
addl_order_information_i	ORDER_NBR
addl_order_information_i	REMARKS_1
addl_order_information_i	REMARKS_2
addl_order_information_i	REMARKS_3
addl_order_information_i	ORDER_ID
pcars_general_i	LAST_CLOSING_DATE
pcars_general_i	NEXT_CLOSING_DT
pcars_general_i	PURPOSE_AF526
pcars_general_i	SUSPENSE_526_DT
pcars_general_i	YR_LAST_ANNUAL_526
pcars_general_i	REC_STAT_PCARS
pcars_general_i	REC_STAT_PCARS_PREV
pcars_general_i	PCARS_REC_IND
pcars_general_i	RET_RETENTION_PART_MO_DA
pcars_general_i	DT_20_YR_SAT_SVC_COMPL
pcars_general_i	SUSPENSE_ADVS_ACT_DT
pcars_general_i	OATH_DT
pcars_general_i	ACCESSED_PCARS_DATE
pcars_general_i	CAREER_START_DATE
pcars_general_i	DMD_C_SUSP_DATE
pcars_general_i	CAT_DESIG_FLAG
pcars_general_i	TRNG_RET_CAT_FLAG
pcars_general_i	LOST_PTS_STATUS_DATE
pcars_general_i	TAFMS_YRS_MOS_DYS
pcars_general_i	TAFCS_YRS_MOS_DYS
pcars_general_i	SATIS_SVC_TOTAL
pcars_general_i	PTS_TOTAL_RETIRE
pcars_general_i	PCARS_VAL_FLAG
pcars_general_i	NOTIF_PTS_20_YRS
pcars_general_i	RET_ELIG
pcars_general_i	RET_ELIG_CONTR_DATE
pcars_general_i	REC_CONV_FLAG
pcars_general_i	ADVERSE_ACTION_FLAG
pcars_service_hist_i	DATE_PTS_HIST_FROM
pcars_service_hist_i	DATE_PTS_HIST_TO
pcars_service_hist_i	TYPE_ACT_AD_PT_FLD
pcars_service_hist_i	PTS_NBR_HIST_AD
pcars_service_hist_i	TYPE_ACT_IDT_PT_FLD
pcars_service_hist_i	PTS_NBR_HIST_IDT
pcars_service_hist_i	TYPE_ACT_IDS_PT_FLD
pcars_service_hist_i	PTS_NBR_HIST_IDS
pcars_service_hist_i	TYPE_ACT_ECI_PT_FLD

MILPDS Data Structure	MILPDS Data Item
pcars_service_hist_i	PTS_NBR_HIST_ECI
pcars_service_hist_i	TYPE_ACT_MEMB_PT_FLD
pcars_service_hist_i	PTS_NBR_HIST_MEMBERSHIP
pcars_service_hist_i	TYPE_ACT_RETIRE_PT_FLD
pcars_service_hist_i	PTS_NBR_HIST_RETIRE
pcars_service_hist_i	TYPE_ACT_SAT_SVC_PT_FLD
pcars_service_hist_i	SATIS_SVC_LNGTH_HIST
pcars_service_hist_i	QLTY_CONTROL_PTS_HIST
pcars_service_hist_i	PTS_HIST_STAT
pcars_service_hist_i	ADJUST_REASON_PR_SVC
pcars_service_hist_i	PTS_NR_HIST_TAFCS_PRT_YR
pcars_service_hist_i	SOURCE_DOC_CODE
pcars_service_hist_i	HIST_CAT_DESIG_FLAG
pcars_service_hist_i	HIST_TRNG_RET_CAT_FLAG
pcars_service_hist_i	SVC_HIST_CODE
pcars_pts_curr_rr_yr_i	DATE_FROM_CURR_RR
pcars_pts_curr_rr_yr_i	DATE_TO_CURR_RR
pcars_pts_curr_rr_yr_i	POINTS
pcars_pts_curr_rr_yr_i	DUTY_TYPE_CURR_RR
pcars_pts_curr_rr_yr_i	HALF_DAY_CODE_CURR_RR_1
pcars_pts_curr_rr_yr_i	ECI_COURSE_NUMBER
pcars_pts_curr_rr_yr_i	ECI_COURSE_VOLUME
retirement_appl_i	APPLICATION_TYPE
retirement_appl_i	RETIREMENT_APPLICATION_DATE
retirement_appl_i	RETIREMENT_EFFECTIVE_DATE
retirement_appl_i	APPLICATION_WAIVER_REQUIREMENT
retirement_appl_i	SPECIAL_PROGRAM_ID
retirement_appl_i	RETIREMENT_APPLICATION_REMARKS
retirement_appl_i	HEROISM_PAY_CLAIM_STATUS
retirement_appl_i	SEPARATION_CHARACTER_DISCHARGE
retirement_appl_i	RETIREMENT_STATUS_ID
retirement_appl_i	RETIREMENT_ID
retirement_appl_i	RETIREMENT_SPD
retirement_appl_i	SPD_TRACER
retirement_appl_i	SEPARATION_ACTION_INIT_DATE
retirement_appl_i	REQUESTED_SEPARATION_INDICATOR
retirement_appl_i	RESERVE_RETIREMENT_ID
retirement_appl_i	TITLE_10_SECTION
retirement_appl_i	SPECIAL_PAY_REMARKS
retirement_appl_i	DEPARTURE_DATE
retirement_appl_i	PAS_SEP_ACC
retirement_appl_i	AFR_SEC_ID_SEP_ACC
retirement_appl_i	YRS_MOS_DYS_SERVICE_PAY
retirement_appl_i	YRS_MOS_DYS_ACTIVE_SERVICE
retirement_appl_i	YRS_ACTIVE_COMM_W_O_SERVICE
retirement_appl_i	YRS_MOS_DYS_SERVICE_1405
retirement_appl_i	YRS_MOS_DYS_SERVICE_8888_8927

MILPDS Data Structure	MILPDS Data Item
retirement_appl_i	YEARS_SERVICE_12733
retirement_appl_i	YRS_MOS_DYS_SERVICE_12732
retirement_appl_i	HOLD_REASON
retirement_appl_i	RELEASE_DATE
arc_commitment_i	ARC_COMMITMENT_PROG
arc_commitment_i	ARC_COMMIT_EXP_DATE
retirmnt_asgnmt_info_i	SERVICE_VERIFIED
retirmnt_asgnmt_info_i	LAST_VERIFIED_DATE
retirmnt_asgnmt_info_i	BASE_RETIREMENT_DATE
retirmnt_asgnmt_info_i	DATE_INITIAL_AFR_RETIREMENT
retirmnt_asgnmt_info_i	MANDATORY_CUT_OFF_DATE
retirmnt_asgnmt_info_i	PAY_TERMINATED
retirmnt_asgnmt_info_i	PAY_TERMINATED_DATE
retirmnt_asgnmt_info_i	REEVAL_DATE_FOR_LAST_PHYSICAL
retirmnt_asgnmt_info_i	RETIREMENT_PHYSICAL_EXP_DATE
retirmnt_asgnmt_info_i	RETIREMENT_STATUS_CHANGE_LAST
retirmnt_asgnmt_info_i	RETIREMENT_STAT_CHG_LAST_DATE
retirmnt_asgnmt_info_i	RETIREMENT_SUSPENSE_FLAG
retirmnt_asgnmt_info_i	REASON_MEMBER_WAS_RETIRED
retirmnt_asgnmt_info_i	PAY_DATA_IND
retirmnt_asgnmt_info_i	PAY_PACKET_MAILED
retirmnt_asgnmt_info_i	DATE_PAY_PACKET_MAILED
retirement_orders_i	ORDER_TYPE
retirement_orders_i	ORDER_PREFIX
retirement_orders_i	ORDER_DATE
retirement_orders_i	ORDER_NBR
retirement_orders_i	RET_EFFECTIVE_DATE
retirement_orders_i	STATUS
retirement_orders_i	AUTH_TVL_IND
retirement_orders_i	REMARKS_1
retirement_orders_i	REMARKS_2
retirement_orders_i	REMARKS_3
sbp_i	SBP_OPTION
sbp_i	SBP_PI
sbp_i	RCSBP_REDUCED_PERCENTAGE
sbp_i	SUP_SBP
sbp_i	SBP_SUSPENSE_DT
sbp_i	SBP_DT
service_dates_i	DOE
service_dates_i	ETS_29_FEB_FLAG
service_dates_i	DOS
service_dates_i	EAD_29_FEB_FLAG
service_dates_i	DOS_REASON
service_dates_i	TAFMSD_29_FEB_FLAG
service_dates_i	ETS
service_dates_i	PAY_DATE_29_FEB_FLAG
service_dates_i	EAD

MILPDS Data Structure	MILPDS Data Item
service_dates_i	TEMSD_29_FEB_FLAG
service_dates_i	TAFMSD
service_dates_i	TFCSD_29_FEB_FLAG
service_dates_i	PAY_DATE
service_dates_i	TAFCSO_29_FEB_FLAG
service_dates_i	TEMSD
service_dates_i	TYSD_29_FEB_FLAG
service_dates_i	TFCSD
service_dates_i	SERVICE_DATE_1405_29_FEB_FLAG
service_dates_i	TAFCSO
service_dates_i	PLSD_29_FEB_FLAG
service_dates_i	RES_ACT_STAT_SVC_DT
service_dates_i	ETO_29_FEB_FLAG
service_dates_i	TYSD_TOTAL_YRS_SVC_DATE
service_dates_i	SERVICE_DATE_1405
service_dates_i	RETIRE_DATE_29_FEB_FLAG
service_dates_i	PLSD_PROMO_LIST_SVC_DT
service_dates_i	DIERF_29_FEB_FLAG
service_dates_i	ETO
service_dates_i	DIEUS_29_FEB_FLAG
service_dates_i	ANNIVERSARY_RETIRE_DT
service_dates_i	DOS_PREV
service_dates_i	DOS_PREV_REASON
service_dates_i	PAY_DATE_CHG_REASON
service_dates_i	YRS_MOS_DYS_SVC_1332
service_dates_i	AF_SVC_DATE_CONT_MARK
service_dates_i	DIERF_DT_INITIAL_RSRV_FORCES
service_dates_i	DIEUS_DT_INITIAL_ENT_UNF_SVC
service_dates_i	IADT
final_disposition_i	DISPOSITION_DATE
final_disposition_i	DISPOSITION
final_disposition_i	PERCENT_DISABILITY
final_disposition_i	VA_CODE_1
final_disposition_i	VA_CODE_2
final_disposition_i	VA_CODE_3
final_disposition_i	ICD9_CODE_1
final_disposition_i	ICD9_CODE_2
final_disposition_i	ICD9_CODE_3
final_disposition_i	SAF_MEMO_DATE
final_disposition_i	CASE_ID
disability_order_i	DISABILITY_ORDER_PREF
disability_order_i	ORDER_NBR
disability_order_i	ORDER_DATE
disability_order_i	ORDER_ADDR
general_disblty_info_i	LOD
general_disblty_info_i	EPTS_WITH_SERVICE_AGGRAVATION
general_disblty_info_i	PRESUMP_OF_FITNESS

MILPDS Data Structure	MILPDS Data Item
general_disblty_info_i	CONFLICT_INDICATOR
general_disblty_info_i	ARMED_CONFLICT
general_disblty_info_i	COMBAT_RELATED
general_disblty_info_i	INSTRUMENTALITY_OF_WAR
general_disblty_info_i	COMPETENT
general_disblty_info_i	UNEMPLOYABLE
general_disblty_info_i	SPECIAL_INTEREST
general_disblty_info_i	IMMINENT
general_disblty_info_i	PROXY_RESULT
general_disblty_info_i	DUAL_ACT
general_disblty_info_i	CASE_ID
disability_case_i	CASE_STATUS
disability_case_i	STATUS_DATE
medical_facility_i	MED_FAC_NR
medical_facility_i	MED_FAC_ORGN_DESIG
medical_facility_i	MED_FAC_LOC
medical_facility_i	TDRL_ORDER_ADDRESS
medical_facility_i	TRI_SERVICE_DESIGNATOR
ang_tech_id_i	GRADE
ang_tech_id_i	SCD_CIVILIAN_RETIREMENT
ang_tech_id_i	TOUR_START_DT
ang_tech_id_i	TOUR_END_DT
ang_tech_id_i	ACDU_STATUS
ang_tech_id_i	AGR_PLACE_ORDERED_AD
stop_loss_i	STOP_LOSS_INDIC
stop_loss_i	STOP_LOSS_DATE
stop_loss_i	STOP_LOSS_EXP_DATE
pcars_irr_pts_ad_i	IRR_PTS_AD_CURR_CAL_YR
pcars_irr_pts_ad_i	IRR_PTS_AD_PRIOR_CAL_YR
lost_time_i	BAD_TIME_START_DATE
lost_time_i	BAD_TIME_STOP_DATE
lost_time_i	DAYS_BAD_TIME_CHARGE
lost_time_i	LOST_DAYS_CURR_ENLIST
hi_yr_tenure_i	HYT_DT
hi_yr_tenure_i	HYT_WAIVER_RSN
afr_mandatory_sep_hyt_i	AFR_MAND_SEP_RSN
afr_mandatory_sep_hyt_i	AFR_MAND_SEP_HYT_DATE
serb_rif_info_i	SEL_SVC_FY_BD
serb_rif_info_i	YR_OF_RIF_BD
serb_rif_info_i	RIF_SERB_FLAG

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